

Thomas Roulston, III
Managing Partner
Moondog@trustnavigator.com

Direct 440 995-2831
Cell 216 780-9581

Over the past 25 years, Mr. Roulston has created and run several successful businesses. Since 1997, Mr. Roulston has served as the President of Thomas Roulston III Investment Partners, Inc. From 1996 to 1997, Mr Roulston served as Senior Vice President of Resource Management, Inc. Prior to 1996, he was Senior Vice President of Roulston & Company, Inc. Mr. Roulston is also President and founder of Roulston Buyside Research. Roulston Buyside Research, founded in 2005, complements and enhances Trust Navigator's ability to match investment services with allocation strategies to match a client's risk and performance goals.

Mr. Roulston's background in institutional research sales and money management has allowed him to develop and provide a unique system to analyze portfolio managers and thus provide Trust Navigator's clients with top decile investment performance. The system developed by Mr. Roulston and currently utilized by Trust Navigator and Thomas Roulston Investment Partners, Inc. screens over 6,000 investment management firms from around the world.

The system identifies portfolio managers with disciplines established to outperform their peer groups within over 15 different risk and investment categories. Asset allocation among these portfolio managers is tailored to each client's individual needs and tax situation. As per the system, Trust Navigator provides a thorough review of portfolio manager's performance and comparison to pre-established benchmarks as well as style analysis in their stock selection and allocation. A risk adverse approach of diversification is combined with out performing managers in each investment style.

Similarly, Mr. Roulston developed a system which screens a total universe of over 10,000 mutual funds to create a best in class offering within broadly used style categories. Researchers meet with a plan sponsor to analyze appropriate funds to use in a plan to address the demographics of the participants. Once diversified funds have been chosen, benchmarks are established to ensure best in class funds which are monitored and reports are provided to trustees and participants quarterly. The quarterly reports combined with annual or semi-annual reviews and educational sessions for trustees and participants, has enabled Trust Navigator to establish itself as one of the premier objective and diligent implementers of 401K programs for small and medium sized organizations.

Mr. Roulston attended St Lawrence University and is active philanthropically on the Rock & Roll Hall of Fame Board of Trustees, Recovery Resources, the Shaker 100, and with different service agencies in the metropolitan Cleveland area. Mr Roulston's hobbies include hockey, skiing, softball and hunting.