

RYAN A. HUGHES

Founder & CEO

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San Diego, CA



EXPERIENCE

Founder & CEO

Bull Oak Capital, LLC

2014 - Ongoing San Diego, CA

- An independent financial advisory firm that provides financial planning and investment management services for HNW individuals
- A cash-flow based financial planning process to determine the best course of action our clients should take
- A UCLA Anderson-developed investment strategy focused on risk management and low-cost funds

Vice President, Financial Consultant

Charles Schwab & Co

2010 - 2012 Los Angeles, CA

- Managed over \$300MM in assets for 300 affluent clients

Financial Advisor

Morgan Stanley & Co

2008 - 2010 Los Angeles, CA

- Co-developed a formal office training program for new Associates where I conducted a course which resulted in a higher retention rate (40%) vs. the national average (10%)

2nd Class Petty Officer, VBSS Team Member

United States Navy

2000 - 2004 San Diego, CA

- Boarded over 50 vessels in the Middle East as a member of the VBSS (Visit, Board, Search, and Seizure) Team
- Recipient of the Letter of Appreciation for the safe transfer of 15 Al-Qaeda detainees and confiscation of 2800 pounds of contraband

EDUCATION

M.B.A., Investment Management

UCLA Anderson School of Management

2014

- J. Fred Weston Award Winner (Academic Excellence in Finance)

B.S., Business Admin.

University of Southern California

2007

MOST PROUD OF



Launching a successful firm

Starting a firm out of graduate school with zero clients or start-up capital



Serving my country

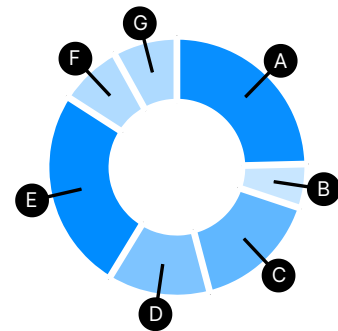
Deployed twice to defend our country in response to 9/11



Having a wonderful family

Grateful husband to an amazing woman and proud father to my two children

MY TIME



- A Finding optimal financial solutions for my clients
- B Enjoying the great outdoors and trying to get in a bit of exercise
- C Spending time with my family
- D Finding ways to continually make Bull Oak Capital the top wealth management solution for clients
- E Allocating my clients funds efficiently & effectively
- F Re-learning the piano & guitar & trying to make music
- G Reading & researching the greatest minds in finance