

# RYAN A. HUGHES

## Founder & CEO

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## 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 working 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 & Merrill Lynch

2007 - 2010 Los Angeles, CA

- Personal financial advisor to high net worth individuals

### 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)
- GAP Fellow (top 5% of program thesis participants)
- Chief Investment Officer - Anderson Student Asset Management

### B.S., Business Administration

#### University of Southern California

2007

- Dean's List and recipient of the Schoen Family Scholarship
- Recipient of the Lloyd Greif Entrepreneur Networking Award

## ACHIEVEMENTS



### Bootstrapping a Successful Firm

Starting a firm after graduate school with no clients or start-up capital



### Serving My Country

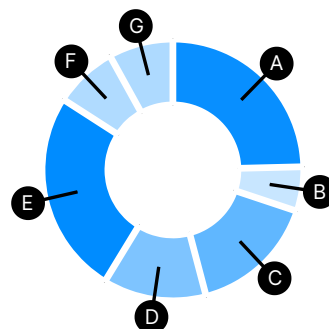
Deployed twice to defend our country in response to 9/11



### Investment News 40 Under 40

Chosen from nearly 1,000 candidates in 2021 based on accomplishments, contribution to the advisor business, and leadership

## 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