



RYAN PARSON MBA, CFP®, CHFC

CURRENT ROLES

- **Chairman/Chief Investment Officer at Heritage Capital USA, Inc**
- **Director - Investor Relations at Colonial Capital Management**
- **National Speaker on Alternative Investing and Portfolio Management**

In his roles at Heritage Capital USA, Inc and Colonial Capital Management, Ryan brings a unique mix of traditional financial services knowledge, as witnessed by his MBA, CFP®, ChFC designations, and a rich history of active participation in alternative investment models such as real estate, discounted and distressed notes and mortgages, and private lending. His current focus is on working with accredited investors seeking exclusive capital placement options that provide diversification, capital preservation, and income.

BACKGROUND

Having grown up involved in his family's real estate business, Ryan coupled that early entrepreneurial experience with a 19-year career in the insurance and financial services industry, where he gained significant knowledge in modeling and how to leverage assets while minimizing risk. These foundations have been integrated into a proprietary model of investment analysis and portfolio management which enable Ryan's firm to consistently create attractive income sources and long-term capital growth for its investors.

Currently, Ryan assists both his current and prospective accredited investors in understanding how 'alternative investing,' defined as investments outside the world of traditional stocks and bonds can be integrated into a well-diversified portfolio. These include such avenues as direct investment opportunities for active investors as well as private placement opportunities for passive investors.

SPECIALITIES/SPEAKING TOPICS

- **Private and institutional capital deployment techniques**
- **Investment analysis and portfolio management**
- **Acquisition of REOs and institutional debt, especially mortgage loans**
- **Identification and management of property rehab projects (residential & commercial)**

Please contact Ryan regarding speaking opportunities:

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