

Jack Montgomery

California-Licensed Professional Fiduciary
Pais Montgomery Fiduciary

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Services performed: Trust and Estate Administration; Conservatorships of Person and Estate.

Fiduciary Practice Profile: Jack has been a California-Licensed Professional Fiduciary since September 1, 2010. He is one of the two principals of Pais Montgomery Fiduciary, a Pasadena-based fiduciary practice dedicated to the needs of their trust and conservatorship clients—with a strong interest in protecting their clients against all potential incidences of elder abuse. Jack has substantial experience in estate and trust administration, and conservatorships of both the estate and person.

Licenses and Certifications: *Professional Fiduciaries Bureau*, State of California Department of Consumer Affairs, License No. PF 457.

Education: B.S., Mechanical Engineering, University of California at Berkeley, December, 1979. Member, Pi Tau Sigma Honor Society for Mechanical Engineers.

Relevant Work History: In addition to his experience as a licensed professional fiduciary, Jack also devoted more than 35 years to a career as a sales and distribution manager, accounts manager, application development engineer, technical services engineer and construction projects engineer, employed by a number of major chemical companies including Du Pont, Bayer, Monsanto and INEOS. His corporate career culminated in his appointment as the manager of a West Coast-based commodity sales business with responsibility for annual revenues of \$20 million. In this capacity, he performed a broad range of financial functions including budgeting and revenue forecasting.

Jack is also a veteran of the United State Army (1973-1976), in which he served as a newspaper reporter and photographer in various Army locations, and culminating in his 1975 appointment as the editor of the *Indianhead*, monthly newspaper for the 2nd Infantry Division, Camp Casey, Korea.

Proven Skills Brought to Professional Fiduciary Practice:

- Extensive experience in the production and submission of forensic accountings for Court-supervised conservatorships and estate administrations, as well as for private trusts.
- Expansive, insightful businessman with a proven ability to manage businesses challenges, large and small, and perform requisite analyses and accountings.
- Solid and expansive technical background, hard-won through 12 years' experience as a technical consultant and two years' experience as a construction projects engineer; trained and ready to manage the technical details of income-producing enterprises within trusts and estates.
- Well-developed oral and written communication skills, grounded by his service as an Army journalist and honed by his many years as a negotiator at the corporate supplier-customer interface. Positioned to act as a strong advocate for the interests of trust beneficiaries and clients within conservatorships.
- Well-developed skills in a wide range of computer applications, including Microsoft Excel, as well as in computer networks installation and maintenance.