



TIBURON STRATEGIC ADVISORS

Industry Leading Think Tank, Advisor, and Investor in
Wealth & Investment Management (and Related WealthTech) Firms

Research & Publishing Director

1. Research & Publishing Responsibilities:

- a. Revise, set up, & unbundle Tiburon research (PowerPoint) documents
- b. Update data to improve research
- c. Incorporate existing research & publishing (PowerPoint) pages to improve research
- d. Conduct Tiburon member interviews to improve research
- e. Research defined issues to improve research
- f. Incorporate clippings library documents to improve research

2. Advisory Responsibilities:

- a. Record Tiburon Webinars
- b. Present one-on-one Tiburon Webinars with Tiburon members
- c. Present at semi-annual Tiburon CEO Summits
- d. Present Tiburon Market Seminars & Conference Speeches
- e. Serve in board roles for Tiburon member firms

3. Management Responsibilities:

- a. Manage a team of research & publishing analysts