FOR IMMEDIATE RELEASE

LIFEvest Financial Literacy Program Receives Impactful Gift
Compak Donates $15,000 to Summer Residential Program for Underserved 9th and 10th Grade Students

Irvine, CA – (December 8, 2015) – Compak Asset Management was recently honored with the Fidelity Investments “Be Greater” award for demonstrating excellence in critical areas of their business. Feroz Ansari, senior principal and portfolio manager for Compak, received $15,000 as part of the recognition package, which was earmarked for the charitable organization of his choice. The LIFEvest Financial Literacy Program, hosted by the Center for Wealth Management (CIWM) at the UC Irvine Paul Merage School of Business, was the lucky recipient.

“Part of the reason we won the Be Greater Award is because of our mission to enhance the life experience of our clients. Giving the $15,000 donation to LIFEvest is just another extension of our mission. With this gift, we can enhance the life experience of tomorrow’s leaders,” said Ansari.

LIFEvest is a weeklong, on-campus financial literacy program, hosted by the CIWM and dedicated to helping underserved 9th and 10th grade students. The program teaches life skills in money and investment management in a highly supportive environment, and seeks to instill a
continued desire to strengthen understanding of financial matters, encourage admission into a
four-year college or university, and to inspire confidence and success in all areas of life. In 2016,
the program will be expanded to host two sections of students: Section 1 will be held July 17-23,
2016 for boys, and Section 2 will be held July 31-August 6, 2016 for girls.

The cost for each student to attend the LIFEvest program is approximately $2,100, a cost that is
funded entirely through the CIWM with generous support from members and sponsors,
including: PAAMCO; Duckworth Wealth Advisors; Beacon Pointe Wealth Advisors; Beacon
Pointe Advisors; US Bank, JP Morgan Private Bank; Canterbury Consulting; Crystal Capital;
Neiman Marcus; PIMCO Foundation; Taco Bell; Wells Fargo Foundation Pamela M. Adams,
CFP®, MBA, Senior Vice President – Investment Officer The Adams Financial Group of Wells
Fargo Advisors, LLC; Schwab Advisor Services and Walmart Foundation. Students who are
selected to participate in the LIFEvest program, do so at no cost to them.

“In today's business environment, being good enough is no longer an option. You have to be
greater,” said Moeez Ansari, president and chief investment officer at Compak Asset
Management, and brother to Feroz Ansari. “At Compak, we are honored to be recognized for
our work. We are proud to be a part of the Center for Investment and Wealth Management, and
even prouder to support the LIFEvest program which will impact the lives of some many of our
young people.” Already Compak offers an internship program for high school students, including
LIFEvest graduates, a program the company plans to continue. “Our hope is that we can set the
example for other businesses to garner additional resources from the community for the
LIFEvest program,” concluded Moeez Ansari.

About Compak Asset Management
Compak Asset Management is an SEC-Registered Investment Advisor dedicated to providing
comprehensive/customized wealth management solutions to its clients including investment
management services, comprehensive financial plans, insurance solutions and estate planning
assistance. Compak has been a CIWM member since March, 2015. For more information, visit
compak.com.
About the Center for Investment and Wealth Management
The CIWM is one of seven Centers of Excellence at the UC Irvine Paul Merage School of Business. Its mission, under the guidance of Faculty Director Andrew J. Policano and the highly valued CIWM advisory board, is to expand knowledge of the complex issues concerning the creation, management and transfer of wealth and to be a respected, transparent source of timely information, educational programs and research on financial literacy, investment and wealth strategies. The CIWM vision is to emerge as a thought leader and source of innovative analysis and provide rigorous analysis and critique of existing practices and will become widely recognized as a hub of activity, research, network and application for a vital international industry.

About The Paul Merage School of Business at UC Irvine
The Paul Merage School of Business at UC Irvine offers four dynamic MBA programs – plus PhD, specialty masters and undergraduate business degrees – that graduate business leaders with the exceptional ability to help grow their organizations through strategic innovation, analytical decision-making, information technology and collaborative execution. While the Merage School is relatively young, it has quickly grown to consistently rank among the top AACSB-accredited programs through exceptional student recruitment, world-class faculty, a strong alumni network and close relationships with both individual business executives and global corporations. Additional information is available at merage.uci.edu.

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