



Mr. Montgomery is a Managing Director at Canterbury with over 27 years of experience serving significant families. He drives the Family Office efforts at Canterbury by advising families in four key areas: Strategy, Measurement, Organization and Effectiveness. In addition to providing core advice on asset allocation and manager selection, Mr. Montgomery brings value to his clients' portfolios by developing wealth strategies that optimize tax considerations and through his education of families on financial stewardship. Mr. Montgomery is a member of Canterbury's Board of Directors and a shareholder of the firm. He also sits on Canterbury's Hedge Fund and Private Equity Manager Research Committees. Prior to joining Canterbury in 1999, he worked as a financial advisor at American Express and spent six years managing his own practice at K.F.M. Mr. Montgomery graduated from Stanford University with an Economics and Political Science emphasis and is a Chartered Alternative Investment Analyst.