

# Punch

## A BOUTIQUE INVESTMENT ADVISORY



### Howard Punch

*Chief Investment Officer*

Howard directs all research and investment initiatives at Punch & Associates. Howard honed his investment management skills the old fashioned way: by making a lot of mistakes. Starting his career in the early '80s at Merrill Lynch in New York City and then in Minneapolis, it was normal practice to call clients with one stock at a time, state the case for owning it and hope for the best. Win, lose, or draw, each pick would have to be revisited with each client (talk about transparency!). The end result was a deep respect for risk, a large dose of humility, and a risk-averse investment approach that anticipates what could go wrong before fantasizing about what could go right. After spending nearly 19 years at Merrill Lynch, Howard started Punch & Associates in 2002.

**Years at Punch:**  
23

**Years in the Industry:**  
41

**Firm Activities:**

- *Board of Directors, Chair*
- *Charitable Giving Committee*
- *Investment Committee, Chair*
- *Portfolio Manager*

**Contact:**  
[howard@punchinvest.com](mailto:howard@punchinvest.com)

A hopeless research addict and devout student of behavioral finance, Howard actively researches market anomalies and inefficiencies. Howard resides in Eagan, Minnesota with his wife, Julie. He is a Magna Cum Laude graduate of Carleton College, enjoys hockey, golf, and believes the Vikings will have the opportunity to lose their fifth Superbowl before he dies.

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## Andy Matysik

*Chief Executive Officer*

As Chief Executive Officer, Andy provides vision and direction for Punch & Associates. He leads the firm's culture, motivating the quality and character of the team and inspiring a relentless dedication to Punch's clients. Andy remains closely involved in all aspects of advisory services at the firm while giving colleagues clarity and helping them focus within their strengths. Andy is passionate about alignment and an organizational design that enables clients and colleagues to achieve a vision that is beyond themselves.

Andy has been a managing partner of the firm since its founding in 2002, leading Punch to become a highly unique and differentiated advisory and asset management firm. Never content with the status quo, Andy insists on defining and delivering purposeful results, inspiring others with a rare combination of humility and humor.

Prior to Punch's inception, Andy was an advisor with a major investment firm. He earned his BBA degree in Finance, Investments, and Banking from the University of Wisconsin–Madison. Andy purchased his childhood home to build a life in the Edina community with his wife, Jennifer, and their four children.

### Years at Punch:

22

### Years in the Industry:

26

### Firm Activities:

- *Board of Directors, Vice Chair*
- *Chief Executive Officer*
- *Compliance Committee*
- *Operating Committee*

### Contact:

*andy@punchinvest.com*

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## John Carraux, CFA, CIC

*Managing Partner & Portfolio Manager*

John is intimately involved in all aspects of the research and investment process at Punch & Associates and works closely with the investment team to manage several investment strategies at the firm. He joined Punch shortly after its inception in 2002 as a research analyst and became a Managing Partner and Portfolio Manager in 2013. He holds both the Chartered Financial Analyst (CFA®) and Chartered Investment Counselor (CIC®) designations.

John lives in the Twin Cities with his wife, Anne, and four children. He graduated Magna Cum Laude and with Delta Epsilon Sigma honors from the University of St. Thomas in St. Paul, Minnesota, and enjoys reading, boating, and skiing with his family.

**Years at Punch:**  
22

**Years in the Industry:**  
22

### **Firm Activities:**

- *Board of Directors, Treasurer*
- *Compliance Committee, Chair*
- *Compensation Committee, Chair*
- *Investment Committee, Member*
- *Trade Oversight Committee, Member*

**Contact:**  
*john@punchinvest.com*

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### Jessica Johnson, JD

#### *Managing Partner*

Jessica is involved in all aspects of our clients' wealth planning. She brings a unique perspective to family conversations, having practiced trust, estate, and charitable planning law at a large local law firm for nearly a decade. Jessica is an advisor skilled in both family financial education and navigating complex planning opportunities. Above all, Jessica enjoys helping clients identify goals and feel organized and confident about their plan.

Jessica received both her BA in Economics and JD from the University of Minnesota with honors. She has been a frequent speaker at educational events for financial advisors, attorneys, and accountants. Jessica also served as an attorney advisor for the United States Tax Court. In her role at the court, she researched complex tax matters and wrote judicial opinions for estate, partnership, corporate, and individual tax cases. Prior to law school, Jessica began her career with a wealth management group.

Jessica grew up in Iowa and Wisconsin, and she now lives in Minneapolis with her husband and two children. She enjoys photography, foosball, and biking outdoors.

#### Years at Punch:

7

#### Years in Financial & Estate Planning:

21

#### Firm Activities:

- Board of Directors
- Compliance Committee
- Charitable Committee

#### Contact:

[jjohnson@punchinvest.com](mailto:jjohnson@punchinvest.com)

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**Todd Spicer, JD, IACCP®, CAMS, CFE**  
*Chief Compliance Officer*

Todd joined the Punch team in June 2023 after several years serving as the Chief Compliance Officer for other large local firms. Todd has an extensive legal and regulatory compliance background in the financial services industry. He is a skilled compliance professional with a focus on developing, implementing, and maintaining robust compliance programs. Above all, Todd enjoys collaboratively working with his colleagues to ensure processes and procedures are pragmatic and effectively implemented.

Todd received his B.S. in Business Management and Administration and a minor in Economics from Bradley University and his JD from Hamline University School of Law. Todd maintains several compliance certifications, including the Investment Adviser Certified Compliance Professional designation, the Certified Anti-Money Laundering Specialist designation, and the Certified Fraud Examiner designation. Todd is an avid sports fan, and when not cheering on his local professional teams, he can likely be found on a field in Mendota Heights coaching or cheering on his four children with his wife or playing at home with his two dogs and two cats.

**Years at Punch:**  
2

**Years in the Industry:**  
15

**Contact:**  
[tspicer@punchinvest.com](mailto:tspicer@punchinvest.com)

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A BOUTIQUE INVESTMENT ADVISORY



## Cory Kiner, CPA

*Senior Advisor & Chief Financial Officer*

Cory is an expert in taxation with a particular interest in developing multi-year tax strategies for individuals, families, businesses, and trusts. Cory joined the Punch team in November 2022, but is no stranger to the organization having collaborated with Punch and many of its clients for more than 15 years from his prior firm. Recognizing tax is only one component of wealth planning, Cory takes great pride in working with clients and their tax preparers to consider tax frameworks that supplement and elevate clients' overall financial and family goals.

Born and raised in Sioux Falls, South Dakota, Cory earned BA degrees in Government/International Affairs and Spanish from Augustana College. He also holds an MBA from the University of St. Thomas in St. Paul, Minnesota. Cory passed the CPA exam in May 2003 as a candidate of high distinction. Prior to joining Punch, Cory was a partner at a Minneapolis CPA firm specializing in tax planning and preparation for high-net-worth individuals, businesses, and trusts.

Cory and his family reside in Bloomington, Minnesota. In his free time, he enjoys tennis, reading, photography, and traveling to discover new places.

**Years at Punch:**

3

**Years in the Industry:**

22

**Contact:**

[ckiner@punchinvest.com](mailto:ckiner@punchinvest.com)

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## Ruth Langworthy, JD, CFP®

*Advisor, Wealth Strategies Group*

Ruth Langworthy joined Punch & Associates in June 2019 as an Advisor. Ruth works with clients in the areas of financial, charitable, and estate planning. Prior to joining Punch, Ruth was an estate planning attorney at a law firm in Chicago. She also assisted donors with complex charitable gifts as part of the planned giving team at Wheaton College.

Ruth is an honors graduate of both Wheaton College, where she double majored in history and philosophy, and the University of Minnesota Law School. A voracious reader, she also enjoys creative endeavors such as knitting and soap making. On the weekends you can find her biking, kayaking, or skiing with her daughter and son.

**Years at Punch:**

6

**Years in Financial & Estate  
Planning:**

15

**Contact:**

*[rlangworthy@punchinvest.com](mailto:rlangworthy@punchinvest.com)*

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## Ryan Punch, CFP®

*Advisor, Wealth Strategies Group*

After his graduation from the University of Wisconsin-Madison with degrees in both finance and economics, Ryan Punch's career began at a global financial firm, where he assisted clients in defining and executing their financial goals.

After achieving his Certified Financial Planner designation in 2020, Ryan dedicated himself to supporting the needs of private clients. He joined Punch in January of 2021 as an Associate Advisor, supporting senior leadership in a wide variety of advisory matters. Ryan's love of puzzles led him to thrive in wealth planning, as he enjoys watching multiple pieces of a financial plan click into place.

In September 2025, Ryan was promoted from Associate Advisor to Advisor, where he now leads client family relationships and mentors Punch's team of Associate Advisors who are following his path. Ryan's solid, dedicated work ethic combined with his easy, good-natured style makes him both a client and colleague favorite.

When not working, Ryan loves to tackle DIY home projects, play golf, hang at the lake, and obsess over his favorite Minnesota sports teams.

**Years at Punch:**

4

**Years in the Industry:**

8

**Contact:**

[rpunch@punchinvest.com](mailto:rpunch@punchinvest.com)

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## Khalil Harris, CFP®

*Associate Advisor, Wealth Strategies Group*

Khalil joined Punch & Associates in March 2024 as an Associate Advisor. Prior to his current position, he honed his skills at two local wealth management firms by working closely with clients to understand their goals and presenting solutions to achieve them. As a member of our Wealth Strategies Group, he is excited to assist clients in all aspects of financial planning.

Khalil graduated from Clemson University with a bachelor's degree in Financial Management and a minor in Accounting. Khalil chose the financial planning as an emphasis area during college and gained early exposure to the nuances of financial advising. In the summer of 2022, he passed his Certified Financial Planner™ exam, and after completing the CFP Board's professional experience requirement, he became certified in the summer of 2023.

Khalil grew up in Illinois and North Carolina, and now lives in Chanhassen. He enjoys working out early in the morning and rooting for all the Chicago (especially the Bears) and Clemson sports teams in his free time.

**Years at Punch:**

1

**Years in the Industry:**

4

**Contact:**

*kharris@punchinvest.com*

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## Maggie Green, JD

*Associate Advisor, Wealth Strategies Group*

Maggie Green joined Punch & Associates in December 2024 as an Associate Advisor. Maggie engages with clients on wealth management topics, drawing on her experience practicing law in the areas of estate planning, trust administration, real estate, corporate entity formation, charitable giving, and tax planning.

Maggie previously owned her own law firm assisting clients with estate planning and probate administration. She was the co-founder of a popular and collaborative legal blog that served as a reference for clients and professionals alike. She graduated from the University of Notre Dame with a B.A. in Theology and earned her JD from the University of St. Thomas.

In her free time, Maggie enjoys cheering on her son's hockey team and coaching her daughters' soccer and volleyball teams, playing tennis or golf, getting lost in a good book, and spending time outdoors with her family. She lives in Edina with her husband, Ryan, and their four children. When asked to join a game of pickle or paddle ball, she will happily comply, but tennis will always be her first choice.

**Years at Punch:**  
<1

**Years in the Industry:**  
12

**Contact:**  
[mgreen@punchinvest.com](mailto:mgreen@punchinvest.com)



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A BOUTIQUE INVESTMENT ADVISORY



## Sam Ludzack, CFA

*Associate Advisor, Wealth Strategies Group*

Sam joined Punch & Associates in December 2024 as an Associate Advisor. Prior to his current position, he worked as the Director of Investments at a local wealth management firm. As a member of the Wealth Strategies Group, Sam enjoys simplifying complex financial concepts for clients.

Sam is a CFA® charterholder and graduated from the University of Northwestern-St. Paul with a bachelor's degree in finance and a concentration in wealth management.

### Years at Punch:

<1

### Years in the Industry:

2

### Contact:

*sludzack@punchinvest.com*

Sam grew up in Shakopee, Minnesota, and now lives there with his wife and son. He likes to be active in his free time by lifting weights, going for runs, or an occasional game of pickleball. Sam is an avid Green Bay Packer fan and tries to go to a game every year.

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## Andrea Barkley

*Director & Senior Client Specialist, Wealth Strategies Group*

Andrea joined the Punch team in March 2016. She began her career in the financial services industry in 1996, and has truly enjoyed growing and learning within it ever since. Her main responsibilities for Punch & Associates revolve around operations. She receives great satisfaction from getting to know clients while guiding them through transactions. Andrea's priority is to provide efficient and effective, yet personal, client service because she genuinely values the relationships that she builds in the process.

When she's not working, she enjoys spending time with her friends and family, working on projects around the house, reading, and playing volleyball. She loves the outdoors and games of all kinds.

### Years at Punch:

9

### Years in the Industry:

29

### Firm Activities:

- Compliance Committee

### Contact:

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## Danielle Fischer

*Senior Client Specialist, Wealth Strategies Group*

Danielle has a track record of operations experience that includes a variety of roles at Merrill Lynch and several years at Punch, where she puts her positive, can-do attitude to work for clients day after day. She's a master of follow ups, follow throughs, and finding answers. Her actions speak volumes to clients, who know her to be their go-to advocate when issues arise. She cares deeply about the work she does and how it impacts everyone around her, which is why it's statistically impossible to find someone who doesn't like working with Danielle (we dare you to try).

**Years at Punch:**  
13

**Years in the Industry:**  
26

**Contact:**  
[danielle@punchinvest.com](mailto:danielle@punchinvest.com)

Danielle resides in Zimmerman with her husband Mark and their two children—the loves and lights of her life. In addition to being an avid dog lover, Danielle likes a good hike or an afternoon of painting with her kids. She also enjoys watching her kids grow into the wonderful people they are becoming.

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### Miraya Gran

*Senior Client Specialist, Wealth Strategies Group*

“Most trusted advisor” is a moniker that Miraya works hard to help Punch achieve. After more than a decade working at law and tax firms, she developed a deep love for client care and being part of a team that offers a sky-high level of service. Being a Client Specialist at Punch allows her to do just that.

On any given day, you’ll find Miraya opening, closing, and transferring accounts, acting as a liaison between the custodian and the client, and streamlining processes. She has an exceptional ability to build rewarding, long-term relationships with clients and spot their needs from miles away. Her favorite parts of the job are being one of the first calls a client makes in their time of need and working with philanthropic clients who want to wield their financial resources for good.

Miraya is the proud owner of a Political Science degree from the University of Minnesota and an even prouder Golden Gopher, which means she never misses a chance to catch a game at TCF Bank Stadium or The Barn—not surprising for someone with a “work hard, play hard” motto. Speaking of playing hard, she’s a big fan of snowmobiling, boating, golfing, and traveling with her equally fun-loving hubby. If you need a good beach read or book club selection, just ask Miraya. She’s often pages deep into her book du jour and is more than happy to discuss its merits with you at length. That is, unless a client needs her attention. Then you’ll just have to wait.

**Years at Punch:**

8

**Years of Professional  
Experience:**

18

**Contact:**

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## Austin Van Bommel

*Senior Client Specialist, Wealth Strategies Group*

Austin joined Punch & Associates in March 2022. He was previously the Director of Operations for an independent wealth advisory firm where he assisted with trading, financial planning, and wealth and business operations. Additionally, Austin brings trust experience to the Punch team having previously worked at a trust company. He assists with account opening, maintenance, and money movement. Austin likes to see the full picture for a client so he can best understand how to help in any situation.

Austin graduated from the University of Sioux Falls with a double major in Public Accounting and Business Administration. After a couple of years in Sioux Falls, South Dakota, Austin and his wife moved to Minnesota and currently reside in Edina with their two young daughters. Outside of the office, Austin likes spending time with his family outdoors and enjoys summers fishing and boating at the cabin in northern Minnesota. You can also find Austin rooting on the Twins and Vikings throughout the season despite their continual disappointment!

**Years at Punch:**

3

**Years in the Industry:**

11

**Contact:**

*avanbommel@punchinvest.com*

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## Heather Rezab

*Client Specialist, Wealth Strategies Group*

Heather joined Punch in August 2025. She has worked in the business for roughly 13 years. Most recently she worked as a Senior Client Relationship Assistant at a large brokerage firm. She assists in account opening, money movement and general account maintenance. She enjoys connecting directly with clients and learning about their financial needs and goals.

Heather graduated from the University of Minnesota Morris, with degrees in English and Spanish. She currently lives in Champlin with her husband, John and two sons. When she is not at work, she enjoys snuggling with her Sheepadoodle, Bella, and taking her to the dog park, working on embroidery projects, reading, camping, adventuring with her family, and watching all her favorite Minnesota sports teams.

**Years at Punch:**

<1

**Years in the Industry:**

13

**Contact:**

*hrezab@punchinvest.com*

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## Chris Verbracken

*Director of Technology*

Chris Verbracken joins our team as Director of Technology. Chris has spent the last decade helping customers transform their business processes through the use of technology. Over the years, Chris has led dozens of successful implementations with customers big and small, and he holds over 20 professional certifications. He looks forward to leveraging his experience to help take the firm to the next level in our use of technology, with the aim of improving both employee and client experiences. Chris will also serve as the firm's Chief Information Security Officer (CISO), ensuring our systems and data are secure. He will also work with our Chief Compliance Officer to ensure we are compliant with accountabilities set forth by the Securities and Exchange Commission.

**Years at Punch:**

*1*

**Years in the Industry:**

*13*

**Contact:**

*cverbracken@punchinvest.com*

Chris has a B.A. and M.A. in Theological Studies. He resides in Ramsey with his wife and three daughters, and in his free time he enjoys watching football (Go Packers!) and playing board games.

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## Alicia Tompkins

*Senior Performance Analyst*

Alicia Tompkins joined Punch & Associates in July 2022 as a Senior Systems Analyst. She brings over a decade of operations and accounting experience in the financial services industry to our team. Alicia ensures our data systems run smoothly and accurately.

Alicia graduated with a B.S. in Business Administration from Metropolitan State University and an A.A.S. in Financial Accounting from Rasmussen College. She lives in Edina with her husband and their two boys. Between kids' sports and activities, she enjoys flower gardening and spending time outside with the family.

Years at Punch:

3

Years of Professional Experience:

19

Contact:

[atompkins@punchinvest.com](mailto:atompkins@punchinvest.com)

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## Laura Hebzynski

*Senior Data Analyst*

Laura joined Punch & Associates in January 2022 as a Systems Analyst. She has a decade of professional experience in data validation, research, and analysis. She uses her skills to work closely with our Wealth Strategies Group to effectively manage data across several platforms. Laura maintains client and account information, facilitates internal processes to support the Administrative Group, and monitors reconciliation status for all accounts.

Laura graduated with a B.A. in Applied Mathematics from the University of St. Thomas in St. Paul. In her free time, she enjoys biking, swimming, and coaching.

**Years at Punch:**

3

**Years in Data and Project  
Management:**

10

**Contact:**

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## Matthew Peterson

*SalesForce & Client Experience Analyst*

Matthew joined our team in May 2023 as a Systems Reconciliation Analyst. In this role, he diligently monitored our data across several platforms to ensure effective data management and integrity. In 2025, he transitioned to a new role as a SalesForce and Client Experience Analyst. He now oversees our SalesForce and Black Diamond platforms and focuses on streamlining processes, enhancing data accuracy, and driving performance improvements.

Prior to starting at Punch, Matthew worked for a local golf company in sales and support, and he also worked as an assistant golf professional. He graduated from Minnesota State University, Mankato with a B.S. in Finance.

Matthew is currently working on a SalesForce Admin Certificate and loves living an active and healthy lifestyle. He frequents the gym and plays soccer multiple times a week. If you can't find him at the gym or soccer field, chances are he is playing pickleball or golf.

**Years at Punch:**

2

**Years in Data and Project Management:**

2

**Contact:**

*[mpeterson@punchinvest.com](mailto:mpeterson@punchinvest.com)*

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## Carri Hochstetler

*Reconciliation Specialist*

Carri joined Punch & Associates in August 2025 as a Reconciliation Specialist. Carri brings a decade of reconciliation experience to our team to monitor our data across several platforms to ensure effective data management and integrity.

She has a Business Administration degree, graduating Magna Cum Laude. In her free time, she enjoys cruising, riding motorcycles, spending time with her family, and playing with her pugs.

Years at Punch:

<1

Years of Professional Experience:

22

Contact:

[chochstetler@punchinvest.com](mailto:chochstetler@punchinvest.com)

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## Carrie Jensen

*Executive Assistant to Jessica Johnson*

Carrie Jensen joined Punch & Associates in the fall of 2022 as the firm's Front Office Coordinator. Recently, she became Executive Assistant to Jessica Johnson. Before joining the team at Punch, Carrie taught second grade for 20 years and spent the last five years of her career in education serving as an Administrative Assistant. Carrie continues to enjoy supporting the team at Punch and getting to know our clients.

Carrie graduated with a Bachelor of Applied Science from the University of Minnesota – Duluth, majoring in Elementary Education and minoring in Psychology. Later she earned her Master of Arts in Education from Saint Mary's University. She grew up in Minneapolis and now lives in Minnetonka with her husband and daughter. In her free time Carrie enjoys paddle boarding, yoga, traveling, and spending time together with family and friends.

**Years at Punch:**

3

**Years of Experience:**

28

**Contact:**

*[cjensen@punchinvest.com](mailto:cjensen@punchinvest.com)*

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## Julie Boehmke

*Managing Director of Human Resources*

Julie Boehmke is the firm's Managing Director of Human Resources. Julie oversees much of the behind-the-scenes operations at Punch, particularly the firm's human resources, benefits, and recruiting needs.

Julie joins us after many years in firm administration at several local law firms. She has lots of experience wearing multiple hats and prides herself on adapting to any firm need. Julie strives to bring a can-do attitude to her daily work and strongly believes the first step to solving any problem is to meet it with a smile.

**Years at Punch:**

5

**Years in Administration:**

22

**Contact:**

*[jboehmke@punchinvest.com](mailto:jboehmke@punchinvest.com)*

At home, Julie enjoys spending time with her husband, Brian, and their two daughters. Julie also loves to read and travel whenever she can.

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## Candice Larson

*Senior Executive Assistant to the CEO*

Candice Larson joined Punch & Associates with over twenty years of administrative experience. She spent seven years within UnitedHealth Group in administrative supervisory roles and as a project manager to the head of marketing at OptumHealth. She then served as the executive assistant to the Chairman & CEO of The Valspar Corporation. Before joining Punch, Candice started Mighty Girl Friday, a virtual executive assistant services LLC.

Candice attended California State Northridge and the University of Arizona where she studied archaeology and design.

Candice loves international travel and has seen much of the globe. She is a voracious reader and enjoys word games, mountain biking, gardening, yoga, music, and is passionate about animals. She recently served on the board of directors for Minneapolis Animal Care and Control. Candice lives in Waconia with her husband Steve and rescue dog, Starla.

**Years at Punch:**

5

**Years in Administration:**

25

**Contact:**

*clarson@punchinvest.com*

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## Leah Delich

*Marketing & Events Manager*

Leah joined Punch & Associates in the fall of 2021 as our first Marketing Coordinator. She has over a decade of marketing, communications, and brand management experience in the financial services industry. She uses her skills to manage our marketing initiatives and client communications, design newsletters and firm materials, and plan and execute events.

Leah graduated with a B.A. in Communications/Public Relations and a minor in Spanish from Northwestern University – St. Paul. In her free time, she enjoys yoga, reading, and sipping a cup of tea or a fine glass of wine.

**Years at Punch:**

4

**Years in the Industry:**

13

**Contact:**

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# Punch

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## Bob Lynch

*Senior Trader*

The stock market called to Bob at a very young age, which is probably why he hightailed it to an internship at Punch during his collegiate years at the University of St. Thomas, where Bob graduated with a BA in Financial Management. There was something about the breakneck pace of trading and steep learning curve of investing that drew him in and never let go.

Now a full-time head trader, Bob spends the majority of his time monitoring the market and putting cash to work for clients. While many of his professional peers get caught up in the chaos of the trading environment, Bob opts for a cool, calm, and collected approach so he can exert his energies on the small details that can make or break a trade. As a result, clients put their cash in his capable hands with trust and assurance.

During the summer months, Bob spends a majority of his time on Lake Minnetonka. He enjoys doing any outdoor sport that involves a board and tinkering with cars and motors when he's not on the water.

**Years at Punch:**  
12

**Years in the Industry:**  
12

**Contact:**  
*bob@punchinvest.com*



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## Paul Dwyer, CFA

*Managing Partner & Portfolio Manager*

Paul has been investing in and working for public companies for over 15 years. Prior to joining Punch & Associates, Paul worked as a research analyst with another buy-side investment firm in town. He also experienced first-hand the trials and tribulations inherent with small cap companies while working in corporate development and strategy for a publicly traded renewable fuels and chemicals company.

Paul graduated from Creighton University with a BSBA in Finance and Accounting and is a CFA® charterholder. Paul lives in Mendota Heights with his wife, Jenna, and their three young children. He enjoys reading, skiing, and anything that gets him outdoors.

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### Years at Punch:

8

### Years in the Industry:

18

### Firm Activities:

- *Board of Directors, Secretary*
- *Investment Committee*

### Contact:

*[pdwyer@punchinvest.com](mailto:pdwyer@punchinvest.com)*

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## Sam Sheldon, CFA

*Research Analyst*

Sam Sheldon joined Punch & Associates in 2016 and serves as an investment research analyst. He focuses on discovering and analyzing small and microcap companies, with a passion for understanding the story behind the business. In addition to his research responsibilities, Sam oversees the firm's internship program.

Sam earned his BA in Financial Management from the University of St. Thomas, where he served as President of the Investment Club, and he is a CFA® charterholder.

Outside of work, Sam enjoys spending time on White Bear Lake, restoring his 1958 boat, cheering on the Green Bay Packers, and getting out for the occasional round of golf. He lives in Lake Elmo with his wife, Taylor.

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### Years at Punch:

9

### Years in the Industry:

9

### Firm Activities:

- *Compliance Committee*

### Contact:

*ssheldon@punchinvest.com*

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## Anthony Peralá, CFA

*Senior Research Analyst*

Anthony knew the right opportunity to pursue his passion for small and microcap equity investing was out there, but it required a little patience. After seven years honing his research skills for two different fixed income asset managers, he joined Punch & Associates as a Research Analyst in September 2021.

Anthony graduated from The College of St. Scholastica with a B.A. in Economics and Villanova University with a M.S. in Finance. He lives in Plymouth with his wife and son. He is very thankful he doesn't have to juggle chasing around a toddler and studying for the CFA exams, having become a CFA® charterholder in 2018. He enjoys traveling and hiking with his family, reading, and baseball.

**Years at Punch:**

4

**Years in the Industry:**

11

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## James Hannack, CFA

*Research Analyst*

James joined Punch & Associates in September 2021 as an Associate Research Analyst. Previously, he worked as an analyst at a publicly traded regional bank where he assessed overall portfolio credit risk.

A Marquette University alumnus, James graduated with a double major in Finance and Accounting. He was a student analyst for Marquette's Applied Investment Management Program covering the financial services sector. James became a CFA® charterholder in April of 2025. In his newfound free time, he enjoys triathlon training, reading, and anything outdoors.

**Years at Punch:**

4

**Years in the Industry:**

7

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## Linnea Åkesson

*Research Analyst*

Linnea joined Punch & Associates in June 2022 as an Associate Research Analyst on the Investment team after interning the fall of 2020 and summer of 2021.

Linnea graduated from the University of Minnesota with a B.S. in Finance and a minor in Accounting. At the University, she participated in the David. S. Kidwell Funds Enterprise as a Fixed Income Analyst specializing in the Consumer Discretionary sector. When Linnea isn't studying for her CFA® designation exam, she enjoys a good game of squash, visiting her family in Sweden, and yoga.

**Years at Punch:**

3

**Years in the Industry:**

3

**Contact:**

*lakesson@punchinvest.com*

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## Kevin Robertson, CFA

*Director of Institutional Relationships*

As the Director of Institutional Relationships, Kevin is responsible for broadening our presence in the institutional market. He prides himself on taking a collaborative approach with clients, serving as an informational resource on behalf of our investment team. Kevin joined Punch in June 2024, and he brings almost 20 years of investment experience to the firm. He regularly travels throughout the country to ensure our clients always have the communication and resources they need.

Kevin is a CFA® charterholder and graduated from Trinity College with a B.A. in Political Science, where he was a member of their NESCAC championship football team. He lives in Hingham, Massachusetts with his wife, Amanda, and their three young children. In his spare time, Kevin enjoys golfing, skiing, and coaching his kids' various sports teams.

**Years at Punch:**

<1

**Years in the Industry:**

17

**Contact:**

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