



**BAKER STREET ADVISORS**

*Independent. Customized. Focused.*

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## **Part 2B of Form ADV The Brochure Supplement**

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This brochure supplement provides information about Jeffrey W. Colin, James E. Milligan, Michael van den Akker, and Christopher J. Wilkens. It supplements the Advisor's accompanying Form ADV brochure. Please contact the Advisor's Chief Compliance Officer at 415.344.6184 if you have any questions about the Form ADV brochure or this supplement, or if you would like to request additional or updated copies of either document.



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Completion of college level study or its equivalent is generally required of Advisor's representatives. Additionally, a thorough knowledge of economic and financial principles, modern portfolio theory, optimization techniques as well as their application must be demonstrated. This may be accomplished via business experience, education, and passage of securities examinations, attainment of professional designations or a combination thereof.

## **Jeffrey W. Colin's Biographical Information**

### **Educational Background and Business Experience**

Year of Birth: 1963

#### **Formal Education after High School:**

Northwestern University – BS, 1985

J.L. Kellogg Graduate School of Management – MBA, 1991

#### **Business Background for the Preceding Five Years:**

October 2003 to Present

President, Baker Street Advisors, LLC

December 2002 to August 2003

Managing Director, Deutsche Bank Alex Brown

May 2001 to October 2002

Managing Director, Robertson Stephens

February 2000 to May 2001

Managing Director, myCFO, Inc.

August 1991 to February 2000

Vice President, Goldman Sachs

#### **Disciplinary Information**

Mr. Colin has not been involved in any legal or disciplinary events that would be material to a client's evaluation of Mr. Colin or of the Advisor.

#### **Other Business Activities**

Mr. Colin is not engaged in any other investment related business, and does not receive compensation in connection with any business activity outside of the Advisor.

#### **Additional Compensation**

Mr. Colin does not receive economic benefits from any person or entity other than the Advisor in connection with the provision of investment advice to clients.

#### **Supervision**

All investment recommendations at Baker Street Advisors are collaboratively agreed upon and overseen by the Baker Street Investment Committee. The Baker Street Investment Committee is comprised of all of the Baker Street Partners, Patricia Chang - Investment Strategy Group Manager and Ann Thalman -



Chief Compliance Officer. Any of these members can be reached at the number on the cover of this brochure supplement.

## **James E. Milligan's Biographical Information**

### **Educational Background and Business Experience**

Year of Birth: 1961

#### **Formal Education after High School**

University of Texas at Austin – B.S. Civil Engineering 1983

Stanford Graduate School of Business – Master in Business Administration 1987

#### **Business Background for the Preceding Five Years**

March 2011 to Present

Managing Director, Baker Street Advisors, LLC

February 1999 to March 2008

Managing Director & Regional Manager Private Wealth Management (PWM), Goldman Sachs

April 1997 to January 1999

Managing Director, Regional Manager (PWM), Goldman Sachs

August 1987 to April 1997

Vice President and Private Client Advisor (PWM), Goldman Sachs

#### **Disciplinary Information**

Mr. Milligan has not been involved in any legal or disciplinary events that would be material to a client's evaluation of Mr. Milligan or of the Advisor.

#### **Other Business Activities**

Mr. Milligan is not engaged in any other investment related business, and does not receive compensation in connection with any business activity outside of the Advisor.

#### **Additional Compensation**

Mr. Milligan does not receive economic benefits from any person or entity other than the Advisor in connection with the provision of investment advice to clients.

#### **Supervision**

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## **Michael van den Akker's Biographical Information**

### **Educational Background and Business Experience**

Year of Birth: 1952

#### **Formal Education after High School:**

San Francisco State University – BA, 1976

#### **Business Background for the Preceding Five Years:**

February 2004 to Present

Partner, Baker Street Advisors, LLC

October 2005 to Present

Director and Chair of the Asset/Liability Committee, New Resource Bank

September 1999 to February 2004

Managing Director, myCFO, Inc.

January 1985 to September 1999

Partner, Price Waterhouse, LLP

#### **Disciplinary Information**

Mr. van den Akker has not been involved in any legal or disciplinary events that would be material to a client's evaluation of Mr. van den Akker or of the Advisor.

#### **Other Business Activities**

Mr. van den Akker is not engaged in any other investment related business, and does not receive compensation in connection with any business activity outside of the Advisor.

#### **Additional Compensation**

Mr. van den Akker does not receive economic benefits from any person or entity other than the Advisor in connection with the provision of investment advice to clients.

#### **Supervision**

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## **Christopher J. Wilkens's Biographical Information**

### **Educational Background and Business Experience**

Year of Birth: 1971

#### **Formal Education after High School**

University of Wisconsin, Madison – BA 1993

#### **Business Background for the Preceding Five Years**

March 2007 to Present

Partner, Baker Street Advisors, LLC

April 2003 to February 2007

Principal, VERITY Wealth Advisors, LLC

April 1997 to April 2003

Director, Merrill Lynch & Co.

April 1996 to April 1997

Associate, Barclays de Zoete Wedd Securities, Ltd.

July 1993 to April 1996

Analyst, Goldman Sachs

#### **Disciplinary Information**

Mr. Wilkens has not been involved in any legal or disciplinary events that would be material to a client's evaluation of Mr. Wilkens or of the Advisor.

#### **Other Business Activities**

Mr. Wilkens is not engaged in any other investment related business, and does not receive compensation in connection with any business activity outside of the Advisor.

#### **Additional Compensation**

Mr. Wilkens does not receive economic benefits from any person or entity other than the Advisor in connection with the provision of investment advice to clients.

#### **Supervision**

All investment recommendations at Baker Street Advisors are collaboratively agreed upon and overseen by the Baker Street Investment Committee. The Baker Street Investment Committee is comprised of all of the Baker Street Partners, Patricia Chang - Investment Strategy Group Manager and Ann Thalman - Chief Compliance Officer. Any of these members can be reached at the number on the cover of this brochure supplement.