

# GREYCOURT

**Pittsburgh, PA (May 16, 2023)** – Greycourt & Co., Inc., a leading advisor to ultra-high net worth families and family offices, is pleased to announce that Wendy Pan has been hired as a director in Greycourt’s Portland, Oregon office. Ms. Pan is a senior member of the firm’s manager research group and will focus on private equity investments.

Ms. Pan is a skilled investor with nearly a decade of experience in private capital markets. “We are excited to welcome Wendy to Greycourt,” said David Morris, Head of Manager Research for Greycourt. “Her investment acumen, network of relationships, and experience evaluating and executing private equity investments on behalf of taxable families will augment Greycourt’s ability to deliver compelling private equity investment opportunities to our clients.”

Prior to joining Greycourt, Ms. Pan was a senior vice president at Jefferies LLC. In this role, Ms. Pan was responsible for sourcing, performing due diligence, and monitoring investment opportunities with a focus on private equity, private credit and real estate investments across an \$18 billion private bank platform. Prior to her experience at Jefferies, she was a director of private investment research at Segal Marco Advisors, where she focused on private equity, real estate and infrastructure funds for a \$12 billion portfolio. Earlier in her career, she was a vice president in the CIO Office at Bank of America - Merrill Lynch, where, among other responsibilities, she helped develop the bank’s initial impact fund evaluation efforts. Wendy holds the Chartered Financial Analyst (CFA) designation, earned an MBA from the Yale School of Management and earned a Bachelor of Commerce from the University of Toronto. Wendy is bilingual and comfortable conducting business in English and Mandarin.

Hiring Wendy Pan is part of Greycourt’s broader strategy to be a net importer of expert investment research talent. Matt Litwin, CEO of Greycourt, said “The firm’s commitment to attracting and retaining individuals like Wendy supports our efforts to work with many of the world’s most sophisticated clients. We are pleased to be adding her to our team.”

About Greycourt & Co., Inc.

Founded in 1988, Greycourt is one of the premier independent investment advisory firms in the United States. Greycourt provides investment advisory services to ultra-high net worth families, family offices and select institutions from its two offices in Pittsburgh, Pennsylvania, and Portland, Oregon.

For more information, please contact Kristi Combs, Director of Client Relations, at (503) 797-6411 or [kcombs@greycourt.com](mailto:kcombs@greycourt.com).