

SFA Holdings Launches Alternative Investment Consulting and Distribution Firm

SFA Holdings Inc., an umbrella of companies focused on independent financial advisors, has launched Timbrel Capital to assist alternative product sponsors in distributing investment products through broker-dealers, RIAs and their financial advisors.

The firm's services for product sponsors will include fund design/development consulting, national accounts, wholesaling, managing broker-dealer services, operations, compliance support, and due diligence.

Jean Merriman serves as Timbrel Capital's president and will provide due diligence oversight and strategic direction for the firm. Merriman is the vice president of due diligence and product at The Strategic Financial Alliance and spent more than a decade at First Allied Securities from 2005 to 2015, most recently as managing director of product due diligence.

"Timbrel Capital is uniquely positioned to deliver retail alternative solutions that are pre-vetted by a recognized due diligence leader, while assuring that product sponsors enjoy comprehensive support at each stage of the sales cycle, from the initial introduction to a firm's product platform, to the point of sale with advisors and their clients, and beyond," said Merriman.

Other members of the Timbrel team include managing director Brannon McPherson, who has been raising capital in the financial sector for more than 20 years in both the institutional and retail space and will be responsible for

sponsor onboarding and sales.

McPherson was a co-founder and managing partner at Evolv Capital Partners and previously served as managing vice president at MDS Energy Development.

Another managing director, Amanda Teeple, has spent more than 15 years in the alternative investment industry with experience in due diligence, sales, national accounts and product development. Her roles include product consulting, due diligence and national accounts.

Teeple is a former managing partner at Evolv and had previously served as VP of due diligence at Triad Advisors and assistant VP at Realty Capital Securities.

Zach Adams serves as managing director and will oversee and handle operations and technology. He has spent more than nine years gaining approval for clearing, custodial and operational arrangements for alternative investments.

Adams previously served as managing director and head of operations at Evolv and was the former director of business development at NuView Trust.

SFA Holdings' other subsidiary companies include The Strategic Financial Alliance (SFA), an independent broker-dealer and corporate RIA; Strategic Blueprint, a corporate RIA geared towards fee-only advisors, and SFA Insurance Services.

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