



Investing for a lifetime.

March 14, 2018

**James Investment Research, Inc. Announces
Passing of Founder Dr. Frank E. James**

It is with great sadness James Investment Research, Inc., James Capital Alliance, Inc. and the James family informs you James Investment Research, Inc. Founder and Chairman Dr. Frank James Jr. peacefully passed away on Wednesday, March 13, 2019 surrounded by his loving wife and family. Dr. James earned his Ph.D. from Rensselaer Polytechnic Institute in 1967. His dissertation, *The Implications of Trend Persistency in Portfolio Management*, provided a computer-based study of the price movements of every security listed on the New York Stock Exchange between 1926 and 1960.

The results of his research in identifying securities with high probability of future appreciation continue to be used in the firm today. Dr. James was formerly in charge of the graduate management program, and a professor of Management and Statistics, at the Air Force Institute of Technology.

While at James, Dr. James developed a team of seven other portfolio managers. The Portfolio Management team has an average of over 20 years with the firm. The firm has been run by Barry James, CFA, CIC, the President and Chief Executive Officer since 2002. David James, CFA, is the Director of Research and has over 30 years with the firm. Ann Shaw, CFP, is Chief Operating Officer and has also been with the firm over 40 years.

Dr. James brought wisdom and integrity to the job every day and the firm plans to continue in his footsteps. He has always emphasized doing what is right for the client and giving every client our best. The firm has no intention of any major changes and is currently blessed with over \$2.7 billion in assets under management. The firm will remain in the hands of the James Family. JIR will continue with its conservative, research driven approach to investing.

A visitation will be held on Saturday, March 16, 2019 at the Dayton Vineyard Church in Beavercreek, Ohio at 10:00 a.m. Funeral services will follow at 12:00 p.m. Tobias Funeral Home in Beavercreek, Ohio will be assisting with funeral arrangements. In lieu of flowers, donations can be made to Hospice of Dayton.

Ohio's Hospice of Dayton
324 Wilmington Avenue
Dayton, Ohio 45420
<https://www.hospiceofdayton.org/>

We thank you for your continued support and prayers as we celebrate the life of Dr. James.

Sincerely,

Barry R. James
President and CEO

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