



## **Occam Crest Management Forms Advisory Board to Support Growth and Development**

DARIEN, Conn. (October 7, 2025) — Occam Crest Management ("OCM"), a Connecticut-based boutique investment manager, announced today the formation of an Advisory Board to support OCM's continued growth and development. The three initial board members bring several decades of diverse domain experience across wealth management, institutional asset management and investment banking.

The Advisory Board announced today is comprised of:

- Mark Cone, retired co-founder and partner of Causeway Capital Management of Los Angeles;
- Jennifer Foster, Co-Chief Investment Officer of Chilton Investment Company, and
- Roger Hartley, an investment banker and consultant to the global asset and wealth management industries with MHB Advisers, LLC. Hartley is Chair of the Advisory Board.

OCM invests in a concentrated portfolio of small and mid-cap U.S. stocks. OCM is managed by Founder, Principal and Managing Partner, Sturgis Woodberry, in partnership with Senior Analyst, John Ajay. Together, Woodberry and Ajay bring a combined 50 years of portfolio management experience and have collaborated for over ten years.

Under OCM, since January 1, 2022, OCM's underlying fund investments have significantly outperformed all relevant indices and rank in the top decile against peers across most time periods. OCM employs a deep fundamental research process, seeking to identify undervalued stocks that are undergoing significant corporate change.

"I welcome Jennifer, Mark and Roger to our Advisory Board," said Sturgis Woodberry. "I can't be more excited about the opportunity to work with them as John, Paul Pani and I continue to build Occam Crest."

## **About Occam Crest Management**

Occam Crest Management is a Connecticut-based investment boutique founded in 2021 by Sturgis Woodberry. The firm manages certain private funds that focus on concentrated investments in small and mid-cap U.S. stocks through deep fundamental research with a mission of *Uncovering Value in Corporate Change*.

Occam Crest Management Website: <https://www.occamcrest.com/>

## **Contacts**

Paul Pani

[ppani@occamcrest.com](mailto:ppani@occamcrest.com)