

**WOODSTOCK FINANCIAL GROUP, INC.**

**12912 HILL COUNTRY BLVD.,**

**SUITE F-236**

**AUSTIN, TEXAS 78738**

**INSTITUTIONAL - FIXED INCOME**

**HOME OFFICE**

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Member FINRA • SIPC • A Registered Investment Adviser  
[www.woodstockfg.com](http://www.woodstockfg.com)

## **INSTITUTIONAL – FIXED INCOME**

THE AUSTIN OFFICE OF WOODSTOCK FINANCIAL GROUP, INC. serves institutions and high net worth individuals, including general securities sales and trade execution. In this segment of our business, all transactions are riskless principal transactions and we focus on sectors of the fixed income market that we believe are underserved by larger financial services firms.

### **HISTORY AND DESCRIPTION**

The group has an average of 14 years of fixed income trading experience constructed from quality-focused, seasoned professionals with a long history of strong relationships and big firm experience. Our branch office staff shares a strong purpose and core business values which extend to our clients through consistent, responsive service and quality execution.

### **FOCUS**

We focus on fixed income securities, specializing in high yield, including distressed debt, as well as investment grade debt securities, municipal bonds, mortgage-backed securities, US government bonds, ABS, and CDs. Our experienced traders will help you obtain successful execution through either street contacts or our superb institutional and high net worth client coverage.

## **FIXED INCOME STAFF**

### **TRADING**

**Josh Freeman**

**512.314.4491**

**Trader/Analyst: MBS/CMO**

**Industry Experience: 15 Years**

**Education: BS, Finance, Texas A&M**

**Brooks McCall**

**512.314.4412**

**Trader/ Municipal Bonds**

**Industry Experience: 9 Years**

**Education: MBA, Finance,**

**University of Texas at Dallas, BS, Texas A&M University**

**Steve Sutton**

**512.314.4461**

**Trader/Analyst: Investment Grade**

**Corporates**

**Industry Experience: 18 Years**

**Education: Northern Michigan University, University of Houston**

### **PORTFOLIO ACCOUNTING**

**Jeffrey "Lynn" Skarren**

**512.314.4364**

**PORTFOLIO ACCOUNTING**

**INDUSTRY EXPERIENCE: 19 YEARS**

**EDUCATION: BUSINESS, AUSTIN COMMUNITY COLLEGE**

## **MANAGEMENT**

**John G. Lindquist**

**512.314.4448**

**PRINCIPAL, BRANCH MANAGER**

**INDUSTRY EXPERIENCE: 21 YEARS COMPLIANCE**

**EDUCATION: BA, FINANCE, IONA COLLEGE**

**Samuel R. Granett**

**512.314.4361**

**PRINCIPAL, INSTITUTIONAL ASSET MANAGEMENT**

**INDUSTRY EXPERIENCE: 29 YEARS**

**EDUCATION: EXECUTIVE MBA, HARVARD BUSINESS  
SCHOOL BS, U.S. MILITARY ACADEMY, WEST POINT**

**Jeffery Sandberg**

**512.314.4392**

**PRINCIPAL, TRADING AND SALES MANAGER**

**INDUSTRY EXPERIENCE: 26 YEARS TRADING AND SALES**

**EDUCATION: FINANCE, NORTHERN MICHIGAN UNIVERSITY**

## **CONTACT US**

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**12912 HILL COUNTRY BLVD., SUITE F-236**

**AUSTIN, TEXAS 78738**

**MAIN: 512.314.4375**

**TOLL FREE: 800.248.0620**

**FAX: 512.314.4462**



**Steve Sutton**  
**Corporate Bond Trader**

Mr. Sutton worked for both primary and regional dealers as a Corporate and Government Agency Trader before joining Woodstock Financial Group, Inc. With eighteen years of dedicated service in the securities industry he has outstanding product knowledge in a variety of different investment products, including Government, Federal Agency, Corporate and Structured products. He currently trades all investment-grade, distressed and high-yield debt securities. Trading since 1993, he has established relationships with many firms in the investment community that specialize in Corporate and Municipal debt.

Email: [ssutton7@bloomberg.net](mailto:ssutton7@bloomberg.net)

Phone: 512.314.4461



**Brooks McCall**  
**Municipal Bond Trader**

Mr. McCall has been involved in the fixed income markets since 2003, working in both a sales and trading capacity, covering virtually all fixed income classes. He currently works as a trader on the municipal desk, which involves executing order flow for the sales team, providing market color and managing the firm's municipal inventory account.

Email: [bmccall@woodstockfg.com](mailto:bmccall@woodstockfg.com)

Phone: 512.314.4412



**Josh Freeman**  
**Trader/Analyst: MBS/CMO**

Josh Freeman began his career in San Antonio, TX in 1996 at a small boutique brokerage firm. His initial focus was in the retail sector where he quickly accumulated over \$50mm in assets, while also developing some institutional equity relationships. The institutional aspect began to occupy most of his time so he slowly started focusing his efforts in that arena. In 2003, he focused exclusively on institutional fixed income business at another San Antonio based firm, where he later became the Director of Fixed Income & Structured Products. It was in this role that Josh was responsible for sales, trading, marketing and inventory for 200 retail financial consultants, 110 financial institutions, 4 institutional salesman and 2 traders. This became the fastest growing and most profitable division for the broker dealer. Josh joined Woodstock Fixed Income in September 2010 as a taxable trader focusing on MBS/CMO product but also trading investment grade corporate bonds and taxable municipal bonds. He services several institutional sales people as well as insurance company and managed money accounts with over \$1 billion in fixed income securities.

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