

EDUCATION

- Pace University, Computer Science

AREAS OF EXPERTISE

- Credit Risk Assessment & Mitigation
- Market Risk Analytics & Stress Testing
- Regulatory Compliance (CFTC, and NFA)
- Risk Governance & Policy Development
- Derivatives & Futures Market

Everett H. Samms

Consultant

Everett H. Samms, MSG, USAR (Ret.), is a senior financial markets risk executive with more than 30 years' experience across futures trading, derivatives markets, credit risk, market risk, margin operations, and regulatory oversight. Having built and led enterprise risk frameworks for some of the industry's most established brokerage and futures organizations, Everett brings Tölt Strategies' clients expertise spanning institutional, commercial, and retail market participants.

Everett combines hands-on risk leadership and technology-enabled risk management with the disciplined, mission-focused approach he developed over three decades of military service. He builds robust risk frameworks that align operational efficiency with regulatory expectations, balancing disciplined risk management with business growth. His broad experience extends to legal structures, vendor oversight, and multi-state operational management, where he has guided organizations through complex markets and governance challenges.

Most recently, Everett served as Executive Director of Risk – North America at R.J. O'Brien & Associates (RJO), where he led regional risk strategy and oversaw daily exposure monitoring, margin adequacy, and counterparty risk assessment. He chaired the firm's Risk Management Unit and was instrumental in modernizing operational risk processes through the implementation of real-time risk analytics and integrated dashboards. Before that, he served for nearly two decades as Senior Director and Head of Credit at RJO, directing firmwide credit risk governance, onboarding controls, and exposure oversight.

Earlier in his career, Everett held senior leadership positions at PaineWebber and Refco, where he managed teams focused on client onboarding, documentation, margin exposure limits, and financial analysis. He also contributed to the design and development of Credit Limit and Line Exception Reporting systems that enhanced risk transparency and operational efficiency.

Alongside his financial career, Everett served with distinction in both the U.S. Air Force Reserve and the U.S. Army Reserve, retiring as a Master

Sergeant after 30 years' service. His assignments spanned operational, instructional, and advisory roles, including aircraft maintenance and service in support of Operation Iraqi Freedom, and he is the recipient of multiple commendations recognizing his leadership and operational excellence.