



James Tao Presidio Venture Capital, Managing Partner

James was born May 27th, 1976 in Taipei, Taiwan. James has been in the financial services industry since 1999, and is a 1999 graduate of the University of California, Berkeley with a B.A. in Biology and a minor in Business Administration. James started his career as an equities trader and then as an equities analyst. Prior to starting his own firms, SB Investment Group and Presidio Venture Capital, James served as an Associate Director of Commodities Trading at Barclays Capital. James first joined Merrill Lynch in 2007, as an energy trader. In 2011, he transferred his focus to Merrill Lynch Wealth Management. In addition to his roles as Managing Partner with SB Investment Group (Boutique Wealth Management Firm) and Presidio Venture Capital (Private Equity Firm focused on seed funding), James also serves as CFO of Caphin, Inc, CIO of CutRite Glass Solutions and CFO of On Point Entertainment. James is an active contributor to the Jade Buddha Temple. He enjoys playing basketball, golf and poker. He is also an amateur chef, having taken courses at the San Francisco Culinary Academy. However, his most passionate hobby is military history and strategy. James and his family are active contributors to the Jade Buddha Temple.