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EDUCATION

- 2014 **PhD in Finance**, EDHEC Business School, France
 Researched on topics spanning asset allocation, manager selection, inflation hedging and portfolio optimization
- 1993 **M.B.A.**, University of California, Berkeley
 Executive track while employed full-time.
- 1988 **B.A., Mathematics & Computer Science**, Ohio Wesleyan University
 Highest honors: Phi Beta Kappa, Summa cum Laude, full merit scholarship.

PROFESSIONAL EXPERIENCE

- 2014- **Research Associate, EDHEC-Risk Institute**, France
- 2014- **Founder and CIO, minMax Asset Advisors**, Los Angeles, CA
 - In the early stages of setting up an independent investment advisory boutique.
- 2006-2011 **Head of Portfolio Management and Investment Advisor, ABN AMRO Private Bank**, Dubai
 – Set up a Discretionary Portfolio Management program to enhance churn-free annuity revenue.
 – Advised high net worth families and small institutions on portfolio construction, leverage use, risk management, using a wide variety of traditional and alternative asset classes including extensive use of structured products such as equity linked notes, range accruals, accumulators, income generators, currency linked deposits, commodity linked notes, first to default notes, etc. Co-authored a small amount of fundamental research on regional equity markets.
 – Opinion leader via commentaries published in regional newspapers and magazines; public speaker at major regional conferences such as Alternative Investments Summit, Funds Forum, Real Estate Investment World, Index Investments, etc. Lead speaker at firm’s client events.

- 2004 – 2006 On sabbatical in India and Dubai doing interesting “life” projects.
- 1997- 2004 **Managing Director and Sell-Side Analyst, SG Cowen Securities, San Francisco & Boston**
- Led the sell-side US equity sales & research effort in the mid & small cap software sector, a universe of over \$10 billion cap. and 100+ companies. Helped the firm (now called Cowen Group) generate over \$50M revenue based on self-directed fundamental research, management consulting and close support of institutional sales and investment banking teams. Led a team of up to three junior analysts. Research was widely quoted in media by CNBC, Wall Street Journal, SmartMoney, Institutional Investor and others.
 - “Best On Street” award, Wall Street Journal, June 26, 2001. Ranked #4 out of 51 analysts in sector for stock picking.
 - “All Star Analyst” award, Wall Street Journal, June 29, 1999. Ranked #1 for aggregate performance.
 - One of the first analysts to downgrade key sector stocks on Jan.11, 2001. Those stocks fell an unweighted 61% in the 3 months after downgrade vs. – 25% for Nasdaq.
 - Major contributor to firm’s investment banking efforts spanning about two dozen transactions, including IPOs, secondary offerings, private placements and M&A transactions for companies like BEA, Tibco, Ascential, NEON, OnDisplay, etc.
 - Authored many cutting-edge industry studies including a Middleware report in 1997 which heralded the birth of the application integration sector, and the Web Application Server report in 1998 which presaged BEA’s rise, both were crucial to winning investment banking business.
 - Hired in Feb. 1997, promoted to sector Director in 1999 and Managing Director in 2000
- 1993-1997 **Director of Product Marketing, Centura Software, San Francisco Bay Area**
- Led a team of up to half-dozen product managers to deliver positioning, pricing and promotion strategies at this 350-person public company. My team delivered white papers, sales training, client seminars, press briefings, advertising directives, etc. Led two unique campaigns: sector’s first programming competition, “Code Bake-off”, and an innovative “BeerFinder” app.
 - Hired in 1993 as a Senior Marketing Manager, promoted to Group Manager in 1994 and Director in 1995.
- 1989-1993 **Senior Product Marketing Manager, Oracle Corporation, San Francisco Bay Area**
- Executed positioning, pricing and product management tasks, including challenging matrix management, for a \$250M product line of development tools including client roadshows, sales training, white papers, direct mail program directives, etc. Pursued an executive MBA part-time.
 - Hired in 1989 as a Software Engineer, transitioned to Product Line Manager in 1991 and to Senior role in 1992. During 1988-89, served as a part-time software engineer at a small firm.