

ROBERT SMITH

Owner/Managing Director

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SUMMARY

Accomplished Owner/Managing Director(CPA) with CFA and PFS certifications, and a proven record of superior results. With expertise in tax preparation, financial planning, business valuation, investment advisory, due diligence, business consulting projects, financial analysis, cash flow forecasting, financial modeling, investment analysis, risk management, investment portfolio management, capital markets & investment strategies, and cash management. With a 20-year investment performance track record that exceeds the benchmark equity index. Excellent analytical, communication, and client service skills.

SKILLS

Portfolio Management, Investment Policy Development, Asset Allocation, Securities Analysis, Investment Strategies, Capital Markets Experience, Risk Management

WORK EXPERIENCE

Owner/Managing Director

ABC Corporation - September 2002 – Present

- Responsible for tax return preparation and financial planning services to high-net-worth clients.
- Provided investment solutions and tax overlay strategies to high-net-worth clients with specialized tax needs.
- Constructed and managed unique investment strategies for institutions and high-net-worth clients.
- Performed investment analysis & complex financial modeling to generate superior risk-adjusted returns.
- Responsible for several consulting projects involving cash flow forecasting, business valuation, financial analysis, due diligence, financial modeling, budget analysis, investment policy & asset allocation reviews, and business strategy.
- Completed several forensic accounting engagements related to investment mismanagement.
- Completed a 3 1/2-year consulting project for a state agency that resulted in a \$5 million annual improvement in operating results.

Junior Managing Director

ABC Corporation - June 1998 – September 2002

- Introduced a new U.S large-cap equity strategy and track record to the firm.
- Launched and managed a new U.S large-cap equity mutual fund based on that equity strategy.
- Managed large-cap equity investments for institutions, endowments, and high-net-worth clients.
- Worked extensively with marketing staff and outside consultants in new business development with a high success rate increasing new assets by over \$450 million.
- Presented firm investment strategies and returns at investment conferences and individual prospect meetings.

- Created detailed marketing presentations and investment performance reviews, and communicated frequently with clients and investment consultants.
- This is Dummy Description data, Replace with job description relevant to your current role.

SCHOLASTICS

- B.S. in Accounting - 1996 (SUSQUEHANNA UNIVERSITY - Selinsgrove, PA)Ph.D. in Synthetic BioOrganic Chemistry - (University Of Nevada - Reno, NV)B.S. in ACS Certified Chemistry - (Northern Arizona University - Flagstaff, AZ)