**EDUCATION & CERTIFICATIONS**

* Master of Science in Finance. The George Washington University, May 2000.
* Bachelor of Science in Economics. Texas Christian University, December 1996.
  + TCU Dean’s Scholarship, Robert C. Byrd Scholarship, D.R.T. Scholarship.
* Chartered Financial Analyst (CFA) charterholder, May 2003.
* Chartered Alternative Investment Analyst (CAIA) charterholder, Nov 2007.
* Registered Investment Advisor Representative (NASD/FINRA Series 65), June 2001 – Feb 2008.

**TECHNICAL SKILLS**

SQL, Python, MS Excel (w/ macros & VBA), MS Access, MS Word, MS PowerPoint, MS Outlook, Bloomberg, Morningstar Direct.

**PUBLICATIONS**

* “[An Introduction to Swaps](http://www.investopedia.com/articles/optioninvestor/07/swaps.asp),” Investopedia.com, April 2007.

**EXPERIENCE**

**Dimensional Fund Advisors (Austin, TX) April 2007 – February 2016.**

Associate, Investment Analytics & Data, Research Department

* Support the data needs of the Communications department.
  + Provide data for updates (monthly, quarterly, or annually, depending on the document) of all Communications department publications presented to investors in the US, Canada, UK, Europe, and Australia, including the Matrix Book, unbranded PowerPoint slides, performance pages, AUM reporting, and website charts & graphs.
  + Provide ad hoc performance and other data to Editorial, Design, Website, and Presentation groups.
* Co-manage data vendor relations, including Morningstar, Lipper, and Bloomberg.
  + Ensure accuracy of DFA fund data in Morningstar and Bloomberg.
  + New fund surveys, monthly performance and fixed income surveys.
* Data support for Financial Advisor & Institutional Services departments
  + Annual update of Allocation Evaluator tools (US Domestic Equity, US International Equity, US Fixed Income, and UK Global Equity).
  + Answer ad hoc questions from sales teams, frequently regarding: accuracy or interpretation of Morningstar data, the underlying data of a presentation slide, or details of returns calculations.
* Provide Data to Accounting & Legal departments for US Annual Reports, US Prospectus updates, and Canadian Annual & Semi-Annual Reports

**McCaffrey Investment Consulting (Santa Barbara, CA) February 2006 - April 2007.**

* Portfolio analysis for high-net-worth investors.
* Asset allocation designs. Investment manager due diligence, search, and selection.

**Mercer Advisors (Santa Barbara, CA) September 2000 - February 2006.**

Senior Investment Analyst

* Investment Committee member; second-in-charge of $2.9 billion investment program.
* Assets under management (AUM) increased from $1.5 billion to $2.9 billion.
* Flagship equity portfolio earned 8.9% annualized vs. -1.0% for the S&P 500 index (Oct 2000 - Dec 2005).
* Involved in design and implementation of investment philosophy & strategy, including capital market assumptions, asset allocation studies, tax-management, and rebalancing.
* Manager search, selection, and monitoring of mutual funds, separate account managers, and hedge funds.
* Maintained returns data for all model portfolios.
* Responsible for proxy voting and other corporate governance issues.
* Developed and maintained investment presentations and research reports explaining investment strategy to clients and financial planners.
* Development of risk/return profiling tools for financial planners.
* Analysis of prospective high-net-worth client portfolios, including recommendations for improvements.
* Answered ad hoc research requests and questions from financial planners and clients.
* Subject matter expert for quantitative issues.

**AFSCME International (Washington, DC) January 2000 - August 2000.**

Budget Analyst (Contract Assignment): Performed annual budget analysis. Part of team responsible for annual Hudson Rebate calculation.

**United Planning Organization (Washington, DC) September 1999 - December 1999.**

Excel Specialist, Controller’s Office (Contract Assignment): Assisted in changeover to new accounting and payroll systems. Extensive use of Excel for charts and forms. Trained personnel on Excel.

**Fish & Richardson, P.C. (Houston, TX) July 1997 - March 1998**

Litigation Paralegal: Drafted affidavits, correspondence, deposition notices, and court filings; organized and maintained litigation files; prepared filings and exhibits to Federal Courts; performed on-line research.

***TCU Daily Skiff* Newspaper (Fort Worth, TX)**

* Copy Editor (September 1994 - May 1996)
* Opinion Columnist (January 1994 - May 1996)