Résumé

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**OBJECTIVE**

A senior management/professional and business/technical consultant position that would utilise my over 35 years international experience in the public and private sectors, as well as in an NGO and various international organisations. Major strengths in economic policy and development planning; investment / portfolio management; financial, economic and market research and analysis; business valuation; corporate administration; strategic planning; product and business development; international marketing and sales; and project management.

## HIGHLIGHTS OF QUALIFICATIONS

* strong global focus and depth of international experience, both in private, non-profit, and public sectors
* solid educational background in economics and finance, business management, public policy and administration, as well as international development
* strong revenue focus and able to drive a business due to entrepreneurial and hands-on orientation
* able to thrive both in a bureaucracy and a “lean and mean” environment
* cross-functional knowledge, including operations, finance, and marketing
* capable of formulating business development initiatives and forging strategic alliances to generate new business ventures and revenue sources
* effective people and project management skills, as well as investor relations/client service skills

## PROFESSIONAL EXPERIENCE

## Revenue Development Foundation

## Oslo, Norway / Freetown, Sierra Leone

November 2015 – April 2016

**Senior Adviser / Country Manager.** Responsible for RDF programme and operation in Sierra Leone, including budgeting, performance tracking, M&E. Perform advisory role and senior management duties while embedded in the National Minerals Agency as regards the Mineral Rights Administration Project IV (MCAP-IV), in the National Revenue Agency as regards the Non-Tax Revenue System Project (NTRS), and other ongoing projects under the aegis of RDF. Responsible for developing programme capabilities based on opportunities identified and lead business development initiatives in-country and across the region, especially in the areas of non-tax and extractive industries revenues for host countries and capacity building through active knowledge sharing. Report on project activities to the project team(s). Lead business development activities in co-ordination with the Project Officer and the Managing Director.

* ensure delivery of project results according to defined contracts and milestones while actively using the project and core budget resources to maximise impact
* control all project outputs, documentation and funds used in-country in accordance with contracts and administrative guidelines
* manage in-country staff including country administrative role and efficient use of short-term consultants and visits by RDF staff
* represent RDF and build high-level network for RDF leverage and impact from project recommendations and business development. Improve methodologies and tools to support capacity development using RDF systems.

## Commonwealth Secretariat, UK (seconded to Eastern Caribbean Central Bank / Eastern Caribbean Enterprise Fund Ltd.)

Basseterre, St. Kitts and Nevis

March 2012 – July 2013

**CFTC Adviser (Expert) and Chief Executive Officer / SME Investment Manager.** Leadership function included completing the development and establishment of the ECEF, a new venture capital fund and investment management company. This entailed the coordination of all related management functions, inter alia: (a) finalising the strategic and operational plan; (b) completion of budgets; (c) organisational structure; (d) marketing plan; (e) investment analysis and monitoring systems; and (f) establishing a Business Development Services function to provide business counseling and advisory services to SMEs to improve investment readiness and operational effectiveness. Mentoring functions included identifying and mentoring of core personnel to undertake established functions within the ECEF. This included training local staff and counterparts in the management functions of the ECEF. As part of the sustainability of the project, a standard operating procedures manual for the ECEF was also compiled. Fund Management function included seeking and securing additional funding for the investment and operations of the ECEF. This also entailed identifying, leading and championing investment activities and opportunities, and assessing and evaluating potential credible projects up to financial closing. Promotion and Marketing functions included taking a lead role in awareness campaigns, workshops and related promotional materials across the OECS to familiarise business persons and prospective applicants with the expectations of the ECEF criteria. Contractual position.

## Falkland Islands Government

Stanley, Falkland Islands

July 2008 – July 2011

**Head of Policy / Economic Adviser.** Provided macroeconomic advice to FIG in order that it can frame policies to achieve prudent and sustainable economic growth. Managed the Economic Development Strategy project and formed the Falkland Economic Council. Provided research and high level policy and strategic advice on all of FIG’s functions to the Chief Executive, the Government Management Team, as well as to the Legislative Assembly and HE Governor in order that they can develop and meet the country’s social policy objectives. Involved in all aspects of the Government’s business, with particular attention given to economic development, fiscal policy and taxation advice, and planning for change and improvement in government services. Provided advice on developing the long-term economic advantage of the commercial fishery, agriculture, tourism and services industries. Advised on and support the work of the government corporations (FI Development Corporation, FI Meat Company, and Falkland Land Holdings) in achieving structural change in business. Provided advice during the licensing of oil exploration and in any subsequent tax regimes. Managed various research and multi-disciplinary projects and policy reviews drawing in stakeholders both within and outside FIG, including the development of the FI System of National Accounts, economic development strategy, rural development strategy, tourism development strategy, financial strategy reviews of taxation/fiscal policy, corporate planning and performance management, privatization of FIG-owned parastatals and operating agencies, fisheries resource rent and license fee reviews, economic efficiency tests, impact analysis and business recovery plan for the national abattoir, fuel monopoly, government air service, the proposed port project, review of employment laws, and formulation of a capital market development plan. Member of the Corporate Management Team. Supervised 3 full-time professionals in the Policy Unit, and another 4 professionals in the Environmental and Planning Office.

## Glocap Partners LLC

New York, NY, U.S.A.

January 2006 – June 2008

**International Sales and Marketing Consultant.** Contributed to the international development of Glocap Partners' marketing and business development initiatives including the Belstar Multi-Advisor Hedge Fund project. Third-party marketing of four single manager hedge funds (i.e., Ansbacher, KBD, GCA Greater China, Belstar, and C~View).

**Arrow Hedge Partners International Inc. (formerly BPI International/Altus Hedge)**

Toronto, Canada and Bridgetown, Barbados

January 1999 – July 2005

**Managing Director/Consultant.** Acted as the Chief Operating Officer of the Barbados fund management company, and served as Director in four of the five Cayman funds. Responsible for marketing the BPI Global Opportunities Fund, BPI American Opportunities Fund, BPI Global Equity Hedge Fund, Altus Capital Advance Fund, Arrow Voyageur Fund, Arrow Compass Fund and White Mountain European Fund (Cayman-registered long/short equity hedge funds) to high net worth individuals and institutional investors in Europe, North and Latin America, the Caribbean and Far East.

* developed and executed an offshore marketing plan for the Cayman offshore and proposed Dublin UCITS funds, as well as a business plan and corporate budget for the Barbados offshore FMC
* performed strategic marketing and general wholesaling duties, including the development of a distribution network which included private banks, fund-of-fund managers, asset allocators, family offices, offshore trust managers, legal and accounting professionals, and independent financial advisers
* supervised the Cayman funds’ international sales activities which have general monthly subscriptions of up to US$10+ million
* identified qualified investors and created a comprehensive offshore client database (currently consisting of over 8,000 institutions and fund investors)
* performed due diligence on the establishment, formation, marketing and maintenance of fund offerings, including legal and regulatory requirements in various jurisdictions
* supervised the sales administration and client service operations, as well as various third-party fund service providers (consisting of administrator/registrar and transfer agent, prime broker/custodian, portfolio managers and offshore fund listing contacts)
* responsible for the design and development of new product offerings for the offshore markets, including fund-of-hedge funds, multi-manager/multi-strategy funds, Dublin UCITS funds, etc., from project inception, product design and launch, marketing and distribution, and day-to-day back and front office operations
* performed fund manager interviews, screening and selection for new fund offerings, including due diligence on fund managers for the Arrow multi-manager equity fund (fund-of-funds) and supervised trade execution.
* responsible for compliance, disclosure and production of marketing materials and organization of the annual fund directors’ and management company’s board meetings
* designed client and dealer service systems and procedures, dealer agreements, and other reporting systems
* supervised preparation of monthly summary statements, including financial performance.

##### Bayshore Investment Management Inc. and Bayshore Bank & Trust (Barbados) Corporation

Toronto, Canada and Bridgetown, Barbados

April - October 1998

**Vice President, Operations and Business Development.** Responsible for planning the strategy of, as well as implementing, operating and administering the offshore mutual fund and fund management companies. Liaison and supervision of various third-party and in-house service providers (e.g., custodians, registrar and transfer agents, legal counsel, auditors, securities regulators, asset managers and investment committee) from project inception, product design and launch, marketing and distribution, and day-to-day back and front office operations. Contractual position.

* provided key input into the planning and management of new fund offerings, including the design and selection of various asset classes and allocation models for the offshore funds, as well as product pricing
* produced industry, competitive and risk/return analysis, planning strategy for future fund launches and assessing performance of competitive product lines
* responsible for compliance, disclosure and production of marketing materials and provided assistance with the preparation of board meetings
* performed strategic marketing and general wholesale duties, including the development of distribution network which include private banks, offshore trust managers, legal and accounting professionals, and independent financial advisers
* designed client and dealer service systems and procedures, compliance and investment operation systems.

**Trimark International Inc. and Trimark Investment Management Inc.**

Toronto, Ontario, Canada

1993 - 1998

**Director, Investment Operations and Business Development.**  Responsible for and involved in expanding businesses outside Canada by identifying and assisting in the planning, creation, structuring and marketing of offshore investment products, accessing new distribution channels, and promoting international institutional asset management and offshore business development initiatives.

* initiated the firm’s opening into the Southeast Asian/Far Eastern, Caribbean, U.S.A., Latin American and European markets, including research coverage of the institutional, retail and pension marketplaces
* supervised client and dealer service activities for over 19,500 offshore accounts representing $336 million in assets from 120 countries
* developed business development contacts with various offshore institutional investors, such as the Philippine public pension funds (SSS, GSIS, AFP-RSBS), ADB Staff Retirement Fund, IRRI Pension Fund, European Independent Financial Advisors Network, European specialist fund buyers, various Caribbean and Southeast Asian commercial banks, private banks and trust companies, etc.
* constructed and maintained a mutual fund data bank covering vital information on Canadian and offshore funds, including fund types, performance/track records, risk profiles, management fees and distribution channels (from Micropal, Lipper, Morningstar, Fund Research Ltd., and other sources)
* monitored rules of entry, government regulatory frameworks, political risks, and capital market trends in foreign mutual fund industries as regards Trimark's strategic expansion into overseas markets
* conducted presentations, field research and prospecting trips in the Philippines, Hong Kong, China, Taiwan, Korea, Singapore, Malaysia, Thailand, U.S.A., Ireland, Luxembourg, Bermuda and the Cayman Islands aimed at developing possible offshore distribution and strategic/joint venture partnerships with overseas financial institutions and intermediaries
* took the lead in preparing project feasibility studies and business plans for the establishment of field representative offices and offshore fund operations in Dublin, Bermuda, Barbados, London, the Philippines and other offshore situses, including equity participation in joint venture investment management and fund companies with foreign and local partners, such as The World Bank / IFC
* participated in Trimark's annual Prospectus and Annual Information Form renewal process for all funds, including the full review of all changes and amendments on documents such as Declaration of Trust, Management Agreements, Distribution Agreements, etc.
* undertook hands-on training with the various investment managers/teams in Toronto in preparation for portfolio "cloning" functions in Dublin and Bermuda, as well as to assume money market fund manager role for the planned offshore U.S. dollar money market fund
* introduced and produced "Start Me Up," a daily on-line financial newsletter that includes financial and market statistics, industry and regulatory developments, competitor analysis, and particular items on Trimark funds geared to inform staff of investor/dealer services, trust services and marketing departments
* researched and produced the "Monthly Economic Summary," a report on important developments in Canadian, U.S., European, Far East and Latin American economies with appropriate interrelationship comments using key indicators such as the stockmarkets, interest rates, macro and microeconomic statistics, etc.
* provided a monthly analytical summary review for marketing personnel and senior executives describing the investment holdings in various Trimark funds, and reasons for buy, sell and hold strategies
* undertook several special research projects, such as the introduction of asset management accounts, socio-demographic factors affecting the fund market, new product research on dividend funds and REITs, marketing Trimark offshore funds through the Internet, offshore variable annuities, etc.

**New York City Mayor’s Office of Economic Development, Economic Policy and Marketing Group**

New York City, New York, U.S.A.

1990 - 1992

**Senior Economist/Policy and Financial Analyst.** Provided the Mayor with policy advice and prepared studies on the City’s economy, as well as recommendations for enhancing job growth and business development. Engaged in policy and program development emphasizing municipal tax and spending policies that encourage business in-migration, retention and expansion. Maintained close liaison with New York-based international organisations, major financial and multinational institutions, other city and state agencies, business associations and local business development corporations to collectively promote and enhance New York’s leading position as a world financial, publishing, design and manufacturing hub.

## The World Bank/IFC, Asia Regional Office

Washington, D.C., U.S.A.

1989

**Consultant/Researcher.** Involved in sector analysis of policy/management issues affecting Sri Lankan agriculture. Conducted policy research on "Addressing the Health Needs of the Asian Poor" and "How to Reach the Poor through Ground Water Irrigation.” Performed socio-economic impact studies, cost-benefit and financial analysis, as well as program/project evaluation with a view to improving Bank lending policies and procedures toward Asian member states. Contractual position.

## United Nations Development Programme and Trading Corporation of Lesotho

Maseru, Lesotho, Southern Africa

1984 - 1986

**Trade Economist/UNV.** Participated in a managerial capacity in establishing and operationalising the state trading organization. Provided administrative, managerial, technical advice and support to TCL management, the Board of Directors and local staff on key areas of trading operations, financial planning and business development. Drafted Cabinet memos and policy papers. Prepared annual company budgets and marketing plans. Set up an economic/market intelligence unit and M.I.S. for the parastatal. Provided training to local counterpart staff. Contractual position.

## OTHER WORK EXPERIENCE

* **Maryland Department of Economic and Employment Development, Office of Research**

Baltimore, Maryland, U.S.A.

1988

**Economist II** (contractual position)

* **Royal Thai Embassy, Commercial Office**

Manila, Philippines

1983 - 1984

**Marketing/Commercial Officer**

* **Herdis Group of Companies, Inc., Corporate Planning Division**

Manila, Philippines

1981 - 1982

#### Junior Economist/Project Analyst

* **National Economic and Development Authority, Statistical Coordination Office**

Manila, Philippines.

1978 - 1980

**Economic Development Analyst/Statistician** (contractual position)

## EDUCATION

* **M.A. in Economics/Public Policy and Administration**, University of Wisconsin-Madison, Graduate School, December 1987. Majored in Development Economics and International Business.
* **M.B.A. (Cand.),** Ateneo de Manila University, Graduate School of Business, December 1981 (ABD).
* **B.A. in Economics**, University of the Philippines, School of Economics, May 1980 (Dean's Honour List).

## SEMINARS AND TRAINING COURSES ATTENDED

* Hedge.funds WORLD Singapore 2002, Terrapinn Pte. Ltd., Singapore, September 2002.
* Absolute Strategies Summit, Opal Financial Group, San Juan, Puerto Rico, April 2002.
* MAR Hedge Global Conference, MAR, Southampton, Bermuda, October 2001.
* Global Alternative Investment Management Conference (Europe), ICBC, Geneva, Switzerland, June 2001.
* Global Alternative Investment Management Conference (USA), ICBC, Palm Beach, Florida, USA, January 2001.
* MAR Hedge Global Conference, MAR, Barcelona, Spain, November 2000.
* Global Alternative Investment Management Conference, ICBC, Geneva, Switzerland, June 1999.
* Absolute Strategies Summit, Opal Financial Group, Southamptom, Bermuda, April 1999.
* Investment Management Consultants Association of Canada 1998 Annual Conference, IMCA, Toronto, Canada, May 1998.
* Mutual Funds and Unit Trusts in Asia Conference, IBC Asia Ltd., Hong Kong, September 1997.
* Globalization of Mutual Funds 1997 Conference, Investment Companies Institute and International Bar Association, Hamilton, Bermuda, May 1997.
* Asian Pension Fund Investment and Retirement Benefits Conference, IBC Asia Limited, H.K., April 1997.
* Offshore Trusts, International Tax and Estate Planning for High Net-Worth Individuals, Strategy Institute, Toronto, Canada, February 1997.
* Global Investment Client Conferences, State Street Bank/BFDS, Toronto, Canada, November 1996/7.
* Annual Investment Funds Institute of Canada Conference, IFIC, Toronto, Canada, September 1996/7.
* Trading on the Internet & Other Direct-Purchase Stock Programs, Insight Information Inc., Toronto, Canada, June 1996.
* Offshore Funds (Winter) Forum, International Business Communications Inc., Cayman Islands, December 1995/6.
* Canadian Securities Course, Canadian Securities Institute, Toronto, Ontario, Canada, Spring 1993.
* Export Project Identification & Development Seminar and Trade Facilitation Seminar, International Trade Centre-UNCTAD/GATT and Commerce & Industry Ministry-Trade Promotion Unit, Maseru, Lesotho, February and October 1985.
* Quantitative Analysis in Business, Financial Management, and Operations Management, Herdis Management Studies Program, Asian Institute of Management, Manila, Philippines, January-June 1981.
* Project Planning & Development Seminar, Herdis Group, Inc., Manila, Philippines, March 1981.

## LANGUAGE PROFICIENCY

* Fluent in both English and Pilipino (Tagalog).
* Working knowledge of Spanish.
* Basic knowledge of French.

## COMPUTER KNOWLEDGE

Proficient in MS Windows 8, 7, Vista, MS Office, Lotus 1-2-3, Excel, Quattro Pro, dBase IV & III Plus, Lotus Approach, Free Lance Graphics (computer graphics), MS PowerPoint, Norton Utilities, WordPerfect, WordStar, Microsoft Works, MS Project, Saleslogix, Janna, Quicken and Winfax. Knowledge of MCAS (Mineral Rights & Cadastre Administration System), ERP, BASIC Programming and MS-DOS. Videoconferencing, Internet, Norton Utilities, BASIC, DOS, Saleslogix, Janna, data entry, systems analysis and design, etc.

Attended several computer training courses at the National Computer Center (Metro Manila, Philippines), including EDP Fundamentals (April 1982), Programming Fundamentals (May 1982), Computer Operations (August-September 1982), and Systems Analysis and Design (October-December 1982).

## PROFESSIONAL AND CIVIC AFFILIATIONS

Member of Canadian Association for Business Economics; Philippine Economic Society; Philippine Statistical Association; American Planning Association; Private Economists Forum (Manila); University of Wisconsin, Ateneo University and University of the Philippines Alumni Associations; Maseru Club (Lesotho); Barbados International Business Association; Barbados Yacht Club; Walden Club (Mississauga, Ontario); and Y.M.C.A. (Manila, Bethesda, New York).

## PERSONAL PROFILE

Called SONNY by friends and relatives. Canadian citizen and resident. Married with two children. Born on May 25, 1957. Third of five children. Both parents were physicians. Hobbies and interests include swimming, bowling, tennis, camping and outdoor hiking, reading, jazz and classical music, piano composition, and travelling. Visited 56 countries (in 5 different continents) . Lived and worked in 8 countries to date.

## REFERENCES

Available upon request.

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*CURRICULUM VITAE*

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**EDUCATION**

M.A. in Economics/Public Policy and Administration, University of Wisconsin-Madison, Graduate School / Center for Development, Madison, WI, USA, December 1987. Majored in Development Economics and International Business.

M.B.A. Candidate (ABD), Ateneo de Manila University, Graduate School of Business, Metro Manila, Philippines, 1979 - 1981.

B.A. in Economics, University of the Philippines, School of Economics, Quezon City, Philippines, May 1980.

**EMPLOYMENT**

November 2015 – April 2016. Revenue Development Foundation, Oslo, Norway / Freetown, Sierra Leone; **Senior Adviser / Country Manager** (contractual).

March 2012 – July 2013. Commonwealth Secretariat (UK) / Eastern Caribbean Central Bank & Eastern Caribbean Enterprise Fund Ltd. (ECCB), Basseterre, St. Kitts and Nevis; **CFTC Adviser (Expert) and Chief Executive Officer / SME Investment Manager** (contractual).

July 2008 – July 2011: Falkland Islands Government, Stanley, Falkland Islands; **Head of Policy / Economic Adviser** (contractual).

January 2006 – June 2008: Glocap Partners LLC, New York, NY, USA.; **International Sales and Marketing Consultant**.

January 1999 – July 2005: Arrow Hedge Partners International Inc. (formerly Altus Hedge Partners International Inc.), Bridgetown, Barbados and Toronto, Canada; **Managing Director/Consultant.**

April 1998 - October 1998: Bayshore Investment Management Inc./Bayshore Bank & Trust (Barbados) Corp., Bridgetown, Barbados; **Vice President** (contractual).

January 1993 - February 1998: Trimark International Inc./Trimark Investment Management Inc., Toronto, Ontario, Canada; **Director (Investment Operations and International Business Development)**.

July 1990 - December 1992: City of New York, Mayor's Office of Economic Development, Economic Policy & Marketing Group, New York, NY, USA; **Senior Economist/Financial Analyst**.

January 1989 - December 1989: The World Bank/IFC, Asia Regional Office, Washington, DC, USA; **Consultant/Researcher** (contractual).

January 1988 - December 1988: State of Maryland, Department of Economic and Employment Development, Office of Research, Baltimore, MD, USA; **Economist II** (contractual).

August 1986 - December 1987: University of Wisconsin-Madison, Center for Development, Madison, WI, USA; **Project Assistant** (part-time campus job and graduate fellowship).

December 1984 - October 1986: United Nations Development Programme (UNDP) / Trading Corporation of Lesotho, Maseru, Lesotho, Southern Africa; **Trade Economist/UNV** (contractual).

January 1983 - November 1984: Royal Thai Embassy, Commercial Office, Metro Manila, Philippines; **Marketing/ Commercial Officer**.

January 1981 - December 1982: Herdis Group, Inc., Corporate Planning Division, Metro Manila, Philippines; **Junior Economist/Project Analyst**.

September 1978 - December 1980: National Economic and Development Authority, Statistical Coordination Office, Metro Manila, Philippines; **Economic Development Analyst/Statistician** (contractual).**EXPERIENCE**

**Economic Policy, Marketing Research and Statistical Analysis**

July 2008 – July 2011: Head of Policy / Economic Adviser, Falkland Islands Government. Provided macroeconomic advice to FIG in order that it can frame policies to achieve prudent and sustainable economic growth. Managed the Economic Development Strategy project and formed the Falkland Economic Council. Provided research and high level policy and strategic advice on all of FIG’s functions to the Chief Executive, the Government Management Team, as well as to the Legislative Assembly and HE Governor in order that they can develop and meet the country’s social policy objectives. Involved in all aspects of the Government’s business, with particular attention given to economic development, fiscal policy and taxation advice, and planning for change and improvement in government services. Provided advice on developing the long-term economic advantage of the commercial fishery, agriculture, tourism and services industries. Advised on and supported the work of the government corporations (FI Development Corporation, FI Meat Company, and Falkland Land Holdings) in achieving structural change in business. Provided advice during the licensing of oil exploration and in any subsequent tax regimes. Managed various research and multi-disciplinary projects and policy reviews drawing in stakeholders both within and outside FIG, including the development of the FI System of National Accounts, economic development strategy, rural development strategy, tourism development strategy, financial strategy reviews - taxation/fiscal policy, corporate planning and performance management, privatization of FIG-owned parastatals and operating agencies, fisheries resource rent and license fee reviews, economic efficiency tests, impact analysis and business recovery plan for the national abattoir, fuel monopoly, government air service, the proposed port project, review of employment laws, and formulation of a capital market development plan. Member of the Corporate Management Team. Supervised 3 full-time professionals in the Policy Unit, and another 4 professionals in the Environmental and Planning Office.

January 1993 - February 1998: Director, Trimark International Inc./Trimark Investment Management Inc. Produced "Start Me Up," a daily financial newsletter that includes market and economic news, financial statistics, mutual fund industry information, and particular items on Trimark funds geared to members of the operations, investment and marketing/sales departments. Undertook hands-on training with the various investment managers/teams in Toronto in preparation for portfolio "cloning" functions in Dublin and Bermuda, as well as to assume money market fund manager role for the planned offshore U.S. dollar money market fund. Researched and produced the "Monthly Economic Summary," a report on important developments in Canadian, U.S., European, Far East and Latin American economies with appropriate interrelationship comments using key indicators such as the stockmarkets, interest rates, macro and microeconomic statistics, etc. Provided a monthly analytical summary review for marketing personnel and senior executives describing the investment holdings in various Trimark funds. Involved in building and maintaining a mutual fund data bank covering vital information on Canadian, U.S., European and Asian funds, such as fund type, performance, management fees and distribution channels. Researched and produced written analysis on ASEAN, European and Latin American markets, including profiles of government regulatory framework, political risk, capital market trends and developments in their mutual fund industries as inputs to the investment management team and to expand Trimark's strategic presence into international markets. Conducted other special research projects as required from time to time. Supervised three research assistants and two student interns.

July 1990 - December 1992: Senior Economist/Financial Analyst, City of New York, Office of Economic Development. Principally involved in analyzing the City's economy and recommending government policies for enhancing job growth in the city. Engaged in policy development with emphasis on the formation of City tax and spending policies that encourage business in-migration and expansion. Analyzed a complete array of business cost factors for individual businesses, industry groups and sectors. Monitored economic development policy initiatives of competing jurisdictions within the metropolitan region and the nation. Evaluated existing City economic development programs for cost effectiveness and performance. Reported regularly on trends in the NYC economy (including labour force, employment, commercial and residential construction, foreign investment, business migration and other measures of business activity, by industry sector). Monitored City contracts for research and other consultant services. Conducted liaison work with other city agencies and bodies.

January 1989 – December 1989: Consultant/Researcher, The World Bank/IFC. Engaged in sector analysis of policy/management issues in Sri Lankan agriculture, specifically on sector strategies for the rice, tree crop, sugar sub-sectors, as well as land tenure, irrigation and farm credit systems. Conducted policy research on "Addressing the Health Needs of the Asian Poor", delving into the impact of health delivery systems and allied social programs on poverty alleviation in LDCs. Also conducted a detailed review of Bank and ephemeral literature on "How to Reach the Poor through Groundwater Irrigation", focusing on the socio-economic impact of groundwater development on the Indo-Gangetic plain (Eastern India, Bangladesh and Nepal); the research project culminated with the successful staging of an international colloquium attended by experts and researchers from the Bank, various international aid organizations, and the region.

January 1988 - December 1988: Economist II, Maryland - DEED, Office of Research. Engaged in research projects on Maryland's state economy using statistical sources and research methods to evaluate structural changes and trends in the state's and region's economies, such as shift-share analysis, ANOVA/multiple regression techniques, input-output models, and computer applications. Performed extensive research work on Maryland’s manufacturing sector employment, productivity, workers’ compensation, State Accident Fund, and the impact and cost-effectiveness of state unemployment and retraining programs. Provided research support to the Office of the Secretary regarding the proposed industrial development projects and entrepreneurship promotion schemes.

December 1984 - October 1986: Trade Economist/UNV, UNDP / Trading Corporation of Lesotho. Established an economic/market intelligence unit and an MIS for the parastatal. Set up systems and procedures for securing economic and trade information from primary and secondary sources. Performed economic analysis and market research studies related to international trading operations. Provided the Commerce and Industry Ministry with operational support, policy work and research inputs, especially vital inputs in designing a national strategic commodities stockpiling scheme and in the preparation of the foreign trade chapter of the Lesotho Five-Year Development Plan, 1986-1990. Trained local counterparts in demand/supply analysis, forecasting, market research techniques, and statistical analysis. Supervised seven local counterpart staff.

January 1983 - November 1984: Marketing/Commercial Officer, Royal Thai Embassy. Prepared economic studies and provided macroeconomic inputs for the Royal Thai Embassy officials. Prepared and disseminated briefing materials on the Thai economy and markets to traders, investors, and researchers. Maintained close contact/dialogue with economists in the Philippine Government, research institutions, academe, and other consulting firms to obtain economic and market information. Supervised three local staff.

January 1981 - December 1982: Junior Economist/Project Analyst, Herdis Group, Inc. Principally concerned with analyzing and monitoring domestic and international economic, financial/political trends, and their repercussions on group-wide operations. Prepared and drafted regular economic reports and industry reviews, business forecasts, market updates, and ad hoc studies. Monitored and analyzed macroeconomic and social indicators, Five-Year National and Regional Development Plans for strategic business planning purposes. Conducted economic briefings for both Management and staff of the holding firm and its subsidiaries. Engaged in joint consultations with government and corporate economists in Manila concerning current business and industry trends, as well as changes in the policy, legislative and regulatory environment. Carried out well-defined research activities on international trade and financial markets. Provided research support to analytical studies and projects conducted by subsidiary firms' economic analysts. Engaged in the collection, manipulation, and computerization of macroeconomic, financial, and commodity market data. Supervised two research assistants.

September 1978 - December 1980: Economic Development Analyst/Statistician, National Economic and Development Authority, Statistical Coordination Office. Detailed to the Economic and Social Impact Analysis/Women in Development Project of NEDA and the US Agency for International Development. Directly involved in establishing a system of macroeconomic and social indicators for use in development planning and policy monitoring. Concentrated on production (national income accounts), finance (monetary and fiscal), foreign trade, employment, and energy sector indicators. Engaged in data collection, manipulation, economic and statistical trend analysis, technical report writing, and editing. Maintained and updated the data base for the economic sector indicators. Participated in a survey of manufacturing and industrial establishments by the National Accounts Staff. Attended various in-house training seminars/modules on survey design, field interviewing, statistical methods and techniques. Participated in regular inter-agency and technical working group meetings with other related economic and regional planning agencies.

**International Trade and Finance**

March 2012 – July 2013. CFTC Adviser (Expert) and Chief Executive Officer / SME Investment Manager, Eastern Caribbean Enterprise Fund Ltd. (ECCB) & Commonwealth Secretariat, Basseterre, St. Kitts and Nevis. Leadership function included completing the development and establishment of the ECEF. This entailed the coordination of all related management functions, inter alia: (a) finalising the strategic and operational plan; (b) completion of budgets; (c) organisational structure; (d) marketing plan; (e) investment analysis and monitoring systems; and (f) establishing a Business Development Services function to provide business counseling and advisory services to SMEs to improve investment readiness and operational effectiveness. Fund Management function included seeking and securing additional funding for the investment and operations of the ECEF. This also entailed identifying, leading and championing investment activities and opportunities, and assessing and evaluating potential credible projects up to financial closing.

July 2008 – July 2011: Head of Policy / Economic Adviser, Falkland Islands Government. Formulated a national export promotion strategy and provide economic, financial and trade advice to FIG and the Chamber of Commerce on new strategies to promote outward-focused and export-oriented sectors. Designed business attraction and export promotion policies, strategies and programmes, as well as fiscal incentives and business support schemes for local producers, joint venture partners and foreign direct investors. Evaluated import substitution policies in the context of national strategic interests. Coordinated and liaised with the European Commission (Economic Development Fund) and the UK Foreign and Commonwealth Office as regards grant funding and economic aid in the form of budgetary support to FIG. Worked closely with the European Investment Bank and other multilateral and international project lenders, as well as the private capital markets and credit rating agencies in obtaining sovereign rating for FIG.

December 1984 - October 1986: Trade Economist/UNV, UNDP / Trading Corporation of Lesotho. Participated in establishing and operationalizing the state trading organization. Provided technical, administrative, and managerial assistance and support to Management, the Board of Directors, and staff on key areas of export marketing, import procurement operations, as well as trade financing. Assisted an inter-ministry task force in designing and implementing a national strategic commodities stockpiling scheme in the wake of an economic embargo by South Africa, particularly in import sourcing and emergency bulk procurement. Drafted the parastatal's operations manual. Trained local counterparts in import sourcing, export marketing, costing and pricing, and trade logistics. Initiated trade contacts and established a network of foreign suppliers and buyers in Africa, Western Europe, COMECON, the Far East, Latin America, and Australia/New Zealand. Participated in negotiations to secure foreign equity financing, trade financing, marketing infrastructures, and in the general day-to-day operational matters. Compiled and maintained a computerized data bank of commodity prices, transport costs, insurance rates, roster of foreign suppliers and buyers, customs duties and taxes, and other vital trade information.

January 1983 - November 1984: Marketing/Commercial Officer, Royal Thai Embassy. Supervised and coordinated the export marketing and investment promotion activities of the Commercial Office. Played an active role in formulating the Office's work program and its implementation, resulting in the doubling of the volume of Thai-Philippine two-way trade in a period of two years. Liaised with other foreign trade missions in Manila to secure vital market information and intelligence. Drafted correspondences, trade inquiries, and promotional materials on behalf of Thai exporters. Prepared and disseminated briefing materials on the Thai economy and markets to prospective Philippine investors and traders, including business opportunities and the regulatory environment in Thailand. Planned and coordinated the trade mission's participation in the 1984 Philippine International Trade Fair. Liaised with Philippine industry associations, patent and customs officials to facilitate and settle bilateral trade disputes/issues. Represented Thai exporters in facilitating the disbursements and repayment by the Central Bank, Philippine commercial banks, and importers during the Philippine foreign exchange crisis in 1984. Attended regular intra-ASEAN/regional trade and finance meetings.

**Project Planning and Program Evaluation**

## November 2015 – April 2016. Senior Adviser / Country Manager, Revenue Development Foundation, Oslo, Norway / Freetown, Sierra Leone. Responsible for RDF programme and operation in Sierra Leone, including budgeting, performance tracking, M&E. Perform advisory role and senior management duties while embedded in the National Minerals Agency as regards the Mineral Rights Administration Project IV (MCAP-IV), in the National Revenue Agency as regards the Non-Tax Revenue System Project (NTRS), and other ongoing projects under the aegis of RDF. Responsible for developing programme capabilities based on opportunities identified and lead business development initiatives in-country and across the region, especially in the areas of non-tax and extractive industries revenues for host countries and capacity building through active knowledge sharing. Report on project activities to the project team(s). Led business development activities in co-ordination with the Project Officer and the Managing Director. Ensured delivery of project results according to defined contracts and milestones while actively using the project and core budget resources to maximise impact. Controlled all project outputs, documentation and funds used in-country in accordance with contracts and administrative guidelines. Managed in-country staff including country administrative role and efficient use of short-term consultants and visits by RDF staff. Represented RDF and build high-level network for RDF leverage and impact from project recommendations and business development. Improve methodologies and tools to support capacity development using RDF systems.

## March 2012 – July 2013. CFTC Adviser (Expert) and Chief Executive Officer / SME Investment Manager, Eastern Caribbean Enterprise Fund Ltd. (ECCB) & Commonwealth Secretariat, Basseterre, St. Kitts and Nevis. Leadership role included completing the development and establishment of the ECEF. This entailed the coordination of all related management functions, inter alia: (a) finalising the strategic and operational plan; (b) completion of budgets; (c) organisational structure; (d) marketing plan; (e) investment analysis and monitoring systems; and (f) establishing a Business Development Services function to provide business counseling and advisory services to SMEs to improve investment readiness and operational effectiveness. Mentoring function included assisting in identifying and mentoring of core personnel to undertake established functions within the ECEF. This included training local staff and counterparts in the management functions of the ECEF. As part of the sustainability of the project, a standard operating procedures manual for the ECEF was also compiled.

January 1999 – July 2005: Managing Director/Consultant, Arrow Hedge Partners International Inc. Supervision of various third-party and in-house service providers (e.g., custodians, registrar and transfer agents, legal counsel, auditors, securities regulators, asset managers and offshore fund listing services). Responsible for the design and development of new product offerings for the offshore markets, including fund-of-hedge funds, multi-manager/multi-strategy funds, structured note products, Dublin UCITS funds, etc., from project inception, product design and launch, marketing and distribution, and day-to-day back and front office operations.

April 1998 - October 1998: Vice President, Operations and Business Development, Bayshore Investment Management Inc. and Bayshore Bank & Trust (Barbados) Corporation. Liaison with and supervision of various third-party and in-house service providers (e.g., custodians, registrar and transfer agents, legal counsel, auditors, securities regulators, asset managers and investment committee) from project inception, product design and launch, marketing and distribution, and day-to-day back and front office operations. Provided key input into the planning and management of new fund offerings, including the design and selection of various asset classes and allocation models for the offshore funds, as well as product pricing. Responsible for compliance, disclosure and production of marketing materials and provided assistance with the preparation of board meetings. Designed client and dealer service systems and procedures, compliance and investment operation systems.

January 1993 - February 1998: Director, Trimark International Inc./Trimark Investment Management Inc. Prepared project feasibility studies and business plans for the establishment of field representative offices and funds in Dublin, Bermuda, Cayman Islands, Barbados, London, the Philippines and other offshore situses, including equity participation in joint venture investment management and fund companies with foreign and local partners, such as The World Bank/IFC.

July 1990 - December 1992: Senior Economist/Financial Analyst, City of New York, Office of Economic Development. Performed program evaluation of existing business development incentive programs, as well as marketing programs to promote business attraction, retention, and expansion in New York City, including different government-supported small- and medium-scale enterprise and business network development programs. Initiated program proposals and follow through the establishment of industry clusters, business incubator projects, micro loan program, financial engineering projects for small manufacturers' cooperatives, business relocation programs, tax and other business incentive programs, procurement preference schemes, business mentorship and outreach programs for small-, minority- and women-owned enterprises (SMWBEs), as well as retention and expansion initiatives for NYC-based commercial and industrial firms, and assistance to move-ins and resident manufacturers in obtaining power rate reduction/discounts from public utility companies. Conducted business counselling and entrepreneurship guidance seminars for new and potential business start-ups.

December 1984 - October 1986: Trade Economist/UNV, UNDP / Trading Corporation of Lesotho. Prepared feasibility studies on the establishment and operation of central and regional warehouses by the parastatal, the establishment of a separate export marketing organization for Basotho handicrafts, a national strategic commodities stockpiling scheme, and the viability of countertrade arrangements with the Eastern Bloc and China, marketing agency agreements with state trading organizations in these countries, and engaging in third country trading.

January 1981 - December 1982: Junior Economist/Project Analyst, Herdis Group, Inc. Participated in the preparation of several project feasibility studies, including the Pasig River Development Project, the Interbank Building Complex Project, and municipal market complexes for the Human Settlements Ministry's Market Infrastructure Development Program. Contributed in preparing the sections on socio-economic and financial feasibility.

**Financial Analysis and Capital Programming/Budgeting**

## March 2012 – July 2013. CFTC Adviser (Expert) and Chief Executive Officer / SME Investment Manager, Eastern Caribbean Enterprise Fund Ltd. (ECCB) & Commonwealth Secretariat, Basseterre, St. Kitts and Nevis. Fund Management function included seeking and securing additional funding for the investment and operations of the ECEF. This also entailed identifying, leading and championing investment activities and opportunities, and assessing and evaluating potential credible projects up to financial closing. Staff training and skill transfer provided in the areas of investment selection, business valuation and portfolio management.

July 2008 – July 2011: Head of Policy / Economic Adviser, Falkland Islands Government. Introduced a system of capital budgeting and rationing methodology to assist decision making on future allocation of public financial resources for capital expenditure projects.

January 1999 - July 2005: Managing Director/Consultant, Arrow Hedge Partners International Inc. Produced industry, competitive and risk/return analysis, planning strategy for future fund launches and assessing performance of competitive product lines. Developed and executed the offshore business plan for the Cayman offshore and proposed Dublin UCITS funds, as well as a corporate budget for the Barbados offshore fund management company. Prepared and implemented annual budget and operating plan. Supervised the preparation of monthly summary statements, including financial performance.

April 1998 - October 1998: Vice President, Operations and Business Development, Bayshore Investment Management Inc. and Bayshore Bank & Trust (Barbados) Corporation. Produced industry, competitive and risk/return analysis, planning strategy for future fund launches and assessing performance of competitive product lines.

January 1993 - February 1998: Director, Trimark International Inc./Trimark Investment Management Inc. Prepared the operating budgets, profit/loss statements, cash flow projections and balance sheets in connection with Trimark’s plans for establishing a network of field representative offices and offshore fund products in the Caribbean, West Europe, Hong Kong and the Philippines, including stand-alone subsidiaries and branch offices, as well as co-branding/private labelling arrangements and participation in joint venture investment management and fund companies with local partners and foreign partners, such as The World Bank/IFC.

January 1988 - December 1988: Economist II, Maryland - DEED, Office of Research. Analyzed Industrial Development Bond distribution formulas. Performed financial analysis and economic impact analysis on proposed State-guaranteed private business projects and initiatives for the Office of the Secretary, including the Chrisfield Wharf/Dock Project, the proposed Hagerstown cargo/transport terminal project, and several other private industrial ventures.

December 1984 - October 1986: Trade Economist/UNV, UNDP / Trading Corporation of Lesotho. Prepared annual corporate recurrent and capital budgets. Estimated sales revenues and expenditure forecasts, and translated these into cash flow statement, income statement, and balance sheet forecasts. Negotiated with the Lesotho National Bank, South African, and foreign commercial banks to secure lines of credit and trade financing instruments/facilities for the parastatal. Designed a credit rating system to guide the parastatal's short-term working capital loans/bridge financing to its corporate clients.

**Corporate Planning and Business Development**

## March 2012 – July 2013. CFTC Adviser (Expert) and Chief Executive Officer / SME Investment Manager, Eastern Caribbean Enterprise Fund Ltd. (ECCB) & Commonwealth Secretariat, Basseterre, St. Kitts and Nevis. Coordinated all related management functions, inter alia: (a) finalising the strategic and operational plan; (b) completion of budgets; (c) organisational structure; (d) marketing plan; (e) investment analysis and monitoring systems; and (f) establishing a Business Development Services function to provide business counseling and advisory services to SMEs to improve investment readiness and operational effectiveness. Promotion and Marketing functions included taking a lead role in awareness campaigns, workshops and related promotional materials across the OECS to familiarise business persons and prospective applicants with the expectations of the ECEF criteria.

July 2008 – July 2011: Head of Policy / Economic Adviser, Falkland Islands Government. Managed the development and regular iteration of the Islands Plan, monitoring progress against objectives and against departmental business plans, and linking the IP process with the annual budget planning cycle. Formulated a matrix of development al and service-level key performance indicators to assist the quarterly and annual performance monitoring and evaluation system. Introduced a system of capital budgeting and rationing methodology to assist decision making on future allocation of public financial resources for capital expenditure projects.

January 1999 – July 2005: Managing Director/Consultant, Arrow Hedge Partners International Inc. Acted as Chief Operating Officer of the Barbados fund management company, and served as Director in six of the seven Cayman funds. Responsible for marketing the BPI Global Opportunities Fund, BPI American Opportunities Fund, BPI Global Equity Hedge Fund, Altus Capital Advance Fund, Arrow Voyageur Fund, Arrow Compass Fund, and the White Mountain European Fund (Cayman-registered long/short equity hedge funds) to high net worth individuals and institutional investors in Europe, North and Latin America, Caribbean and the Far East. Developed and executed the offshore marketing plan for the Cayman offshore and proposed Dublin UCITS funds, as well as a business plan for the Barbados offshore fund management company. Identified qualified investors and created a comprehensive offshore client database (currently consisting of about 7,000 institutions and fund investors). Performed due diligence on the establishment, formation, marketing and maintenance of fund offerings, including legal and regulatory requirements in various jurisdictions. Performed fund manager interviews, screening and selection for new fund offerings, including due diligence on fund managers for the Arrow multi-manager equity fund (fund-of-funds) and trade execution. Performed strategic marketing and general wholesaling duties, including the development of distribution network which include private banks, fund-of-fund managers, asset allocators, family offices, university endowments, pension funds, foundations, offshore trust managers, legal and accounting professionals, and independent financial advisers. Responsible for sales administration and client service operations, as well as day-to-day liaison with the fund administrator, prime broker/custodian, portfolio managers, offshore fund database contacts, and other service providers. Responsible for compliance, disclosure and production of marketing materials and organization of the fund’s annual directors’ and the management company’s annual board meetings. Designed client and dealer service systems and procedures, dealer agreements, and compliance and reporting systems.

April 1998 - October 1998: Vice President, Operations and Business Development, Bayshore Investment Management Inc. and Bayshore Bank & Trust (Barbados) Corporation. Responsible for planning the strategy of, as well as implementing, operating and administering the offshore mutual fund and fund management companies. Provided key input into the planning and management of new fund offerings, including the design and selection of various asset classes and allocation models for the offshore funds, as well as product pricing. Produced industry, competitive and risk/return analysis, planning strategy for future fund launches and assessing performance of competitive product lines. Performed strategic marketing and general wholesale duties, including the development of distribution network which include private banks, offshore trust managers, legal and accounting professionals, and independent financial advisers.

January 1993 - February 1998: Director, Trimark International Inc./Trimark Investment Management Inc. Responsible for and involved in expanding businesses outside Canada by identifying and assisting in the planning, creation, structuring and marketing of offshore investment products, accessing new distribution channels, and promoting international institutional asset management and offshore business development initiatives. Initiated the firm’s opening into the Southeast Asian/Far Eastern, Caribbean, U.S., Latin American and European markets, including research coverage of the institutional, retail and pension marketplaces. Supervised the servicing of over 19,500 offshore accounts representing $336 million in assets from 120 countries. Involved in building and maintaining a mutual fund data bank covering vital information on Canadian and offshore funds, such as fund type, performance/track records, risk profiles, management fees and distribution channels. Monitored government regulatory frameworks, political risks, capital market trends and developments in foreign mutual fund industries with a view to expanding Trimark's strategic presence into overseas markets. Conducted presentations, field research and ocular visits in the Philippines, Hong Kong, China, Taiwan, Korea, Singapore, Malaysia, Thailand, the U.S.A., Bermuda and the Cayman Islands aimed at developing possible offshore distribution and strategic/joint venture partnership arrangements with overseas financial institutions and intermediaries.

July 1990 - December 1992: Senior Economist/Financial Analyst, City of New York, Office of Economic Development. Performed detailed quantitative analyses of proposed and in-place business retention, expansion, and relocation programs. Involved in formulating and proposing relevant policy positions for OED and in coordinating policy issues with other divisions, agencies, and organizations. Engaged in initiating long-term quantitative and other analytical projects with the aim of formulating relevant and feasible policies and enhancing OED's knowledge of local business and commerce. Involved in reviewing proposals, selecting, and managing consultant contracts gran by OED for research purposes. Prepared a comparative cost study of business operating costs in various cities. Provided consulting services to other City agencies in the areas of business strategy, market planning, competitive analysis, and industrial policy. Evaluated existing City economic development programs for cost-effectiveness and performance.

January 1989 – December 1989: Consultant/Researcher, The World Bank/IFC. Conducted policy research on rural enterprise development programs supported by farm credit schemes, small enterprise programs, community development programs, and women-in-development programs that aim to achieve agri-business development. Reviewed the effectiveness and penetration of outreach and livelihood programs for small, private, and tenant-owned groundwater distribution systems, the affordability of irrigation and utility rates, as well as the income generation and commercial impact of Bank lending on small enterprise development in rural areas of the Indo-Gangetic plains and in other Asian and African case studies.

December 1984 - October 1986: Trade Economist/UNV, UNDP / Trading Corporation of Lesotho. Provided technical, administrative, and managerial support and assistance to Management, the Board of Directors, and local staff on key areas of corporate planning and business development. Participated actively in planning and designing the parastatal's organizational structure, recruitment policy, performance evaluation, and staff compensation scheme. Drafted and prepared the annual plans of operations containing marketing/sales strategies, targets, as well as procurement program. Acted as temporary Corporate Secretary upon inception of the parastatal.

January 1981 - December 1982: Junior Economist/Project Analyst, Herdis Group, Inc. Provided inputs and research assistance to both the Project Planning and Long-Range Planning staff in formulating the holding firm's strategic plans, including its merger and acquisition and LBO programs, as well as its divestment policy. Engaged in economic and environmental scanning of government policy and regulatory environment in various industries for strategic planning purposes.

**TEACHING ACTIVITIES**

Taught an undergraduate course for one semester on "International Economics" (adjunct lecturer) at the National University of Lesotho in 1985. Organized and conducted computer use tutorials in WordPerfect and Lotus 1-2-3 for the Center for Development students at the University of Wisconsin-Madison in 1987.

**PUBLICATIONS**

"Economic Development Strategy for the Falkland Islands," a policy paper prepared for the Falkland Islands Government, Stanley, Falkland Islands, July 2010.

"White Paper on Government Revenue and Fiscal Policy," a policy paper prepared for the Falkland Islands Government, Stanley, Falkland Islands, March 2010.

"Developing the Knowledge-Based Economy (KBE) in the Falkland Islands: Establishing an International Financial Services Centre and a Business Process Outsourcing Sector (BPO/KPO)," a scoping paper prepared for the Falkland Islands Government, Stanley, Falkland Islands, June 2010.

"Comparisons of Operating Costs: New York City vs. Suburban Alternatives," a staff paper prepared for the Mayor's Office of Economic Development, New York City, NY, USA, May 1991.

"The Municipal Cost of Environmental Programs," a policy paper prepared under short-term contract with Apogee Research, Inc. for the US Environmental Protection Agency, Bethesda, MD, USA, February 1989.

"Manufacturing Matters in Maryland," a staff paper prepared for the Office of Research, Maryland Department of Economic and Employment Development, Baltimore, MD, USA, October 1988.

"Economic and Social Indicators (Chapters on Production, Finance, Foreign Trade, Employment and Energy)," a staff paper prepared by the Statistical Coordination Office, National Economic and Development Authority, Metro Manila, Philippines, 1980.

"Determinants of Coconut Farm Production in the Philippines---A Correlation Study," undergraduate thesis submitted to the School of Economics, University of the Philippines, Quezon City, Philippines, April 1978.

**LANGUAGES**

Native : Pilipino (Tagalog) and English.

Fluent : English and Pilipino.

Working : English, Pilipino, and Spanish.

Basic : French and German.

**SEMINARS AND TRAINING COURSES ATTENDED**

BASIC Programming Course, Ateneo-UNIVAC Computer Center, Manila, Philippines, April-May 1978.

Course on Perceptual Indicators and Technical Writing Seminar, NEDA-Philippine Institute of Development Studies, Manila, Philippines, February 1980 and May 1980.

Project Planning & Development Seminar, Herdis Group, Inc., Manila, Philippines, March 1981.

Quantitative Analysis in Business, Financial Management, and Operations Management, Herdis Management Studies Program, Asian Institute of Management, Manila, Philippines, January-June 1981.

EDP Fundamentals, Programming Fundamentals, Computer Operations Course, and Systems Analysis and Design, National Computer Center, Manila, Philippines, May-December 1982.

Export Project Identification & Development Seminar and Trade Facilitation Seminar, International Trade Centre-UNCTAD/GATT and Commerce & Industry Ministry-Trade Promotion Unit, Maseru, Lesotho, February 1985 and October 1985.

Canadian Securities Course, Canadian Securities Institute, Toronto, Ontario, Canada, Spring 1993.

Offshore Funds (Winter) Forum, International Business Communications Inc., Cayman Islands, December 1995 and December 1996.

Trading on the Internet & Other Direct-Purchase Stock Programs, Insight Information Inc., Toronto, Canada, June 1996.

Annual Investment Funds Institute of Canada Conference, IFIC, Toronto, Canada, September 1996.

Global Investment Client Conferences, State Street Bank/BFDS, Toronto, Canada, November 1996/7.

Offshore Trusts, International Tax and Estate Planning for High Net-Worth Individuals, Strategy Institute, Toronto, Canada, February 1997.

Asian Pension Fund Investment and Retirement Benefits Conference, IBC Asia Limi, Kowloon, Hong Kong, April 1997.

Globalization of Mutual Funds 1997 Conference, Investment Companies Institute and International Bar Lotus Approach Training, CDI Career Development Institutes Ltd., Toronto, Canada, August 1997.

Mutual Funds and Unit Trusts in Asia Conference, IBC Asia Ltd, Wanchai, Hong Kong, September 1997.

Investment Management Consultants Association 1998 Annual Conference, IMCA, Toronto, May 1998.

Absolute Strategies Summit, Opal Financial Group, Southampton, Bermuda, April 1999.

Global Alternative Investment Management Conference, ICBC, Geneva, Switzerland, June 1999.

MAR Hedge Global Conference, MAR, Barcelona, Spain, November 2000.

Global Alternative Investment Management Conference (USA), ICBC, Palm Beach, Florida, USA, January 2001.

Global Alternative Investment Management Conference (Europe), ICBC, Geneva, Switzerland, June 2001.

MAR Hedge Global Conference, MAR, Southampton, Bermuda, October 2001.

Absolute Strategies Summit, Opal Financial Group, San Juan, Puerto Rico, April 2002.

Hedge.fundsWORLD Singapore 2002, Terrapinn Pte. Ltd., Singapore, September 2002.

**COMPUTER KNOWLEDGE**

Proficient in MS Windows 8, 7, Vista, ERP, MCAS, MS Office, Lotus 1-2-3, Excel, Quattro Pro, dBase IV & III Plus, Lotus Approach, Free Lance Graphics (computer graphics), MS PowerPoint, Norton Utilities, WordPerfect, WordStar, Microsoft Works, MS Project, Saleslogix, Janna, Quicken and Winfax. Knowledge of BASIC Programming and MS-DOS. Attended several computer training courses at the National Computer Center (Metro Manila, Philippines), including EDP Fundamentals (April 1982), Programming Fundamentals (May 1982), Computer Operations (August-September 1982), and Systems Analysis and Design (October-December 1982).

**PROFESSIONAL & CIVIC AFFILIATIONS**

Member of the Canadian Association for Business Economics; Philippine Economic Society; Philippine Statistical Association; American Planning Association; Private Economists Forum (Manila); Researchaus Foundation (Manila); University of Wisconsin-Madison, Ateneo University and University of the Philippines Alumni Associations; Barbados International Business Association; Barbados Yacht Club; Walden Club (Mississauga, Ontario); and YMCA (Manila, Bethesda, NYC).

**PERSONAL INFORMATION**

Called SONNY by friends and relatives. Canadian citizen and resident. Married with two children. Born May 25, 1957. Third of five children. Both parents were physicians. Hobbies and interests include swimming, bowling, tennis, camping and outdoor hiking, reading, jazz and classical music, piano composition and travelling. Lived and worked in 8 countries. Visited 56 countries to date.

**REFERENCES**

Mr. B. Raj Bhandari, Former Senior Import Operations and Techniques Adviser, International Trade Centre - UNCTAD/GATT, CH-1211 Geneva 10, Switzerland; Tel. (41-22) 344-2889, E-mail: [raj\_bhandari@yahoo.com](mailto:raj_bhandari@yahoo.com).

Mr. Ken Johnson, Development Director / Development and Regeneration Consultant, University of Bristol, Bristol, United Kingdom, [dkenjohnson@hotmail.com](mailto:dkenjohnson@hotmail.com).

Mr. Roger A. Jullion, Formerly Director of National Accounts at Statistics Canada and Currently President of RA Jullion Consulting Inc., 6 Sagamore Court, Ottawa, Ontario K2J 2Y4, Canada; Tel. (613) 825-3316; E-mail: [jullion@rogers.com](mailto:jullion@rogers.com).

Ms. Janet MacKinnon-Orr, Former Managing Partner, Glocap Partners LLC, retired and living in Vero Beach, FL, USA; Tel. (435) 640-0858 / (321) 327-2843; E-mail: [janmackinnonorr@hotmail.com](mailto:janmackinnonorr@hotmail.com).

Dr. Gil C. Sanguiguit, Jr., Head of Program on Environment and Rural Development, South East Asian Regional Center for Graduate Study and Research in Agriculture (SEARCA), U.P. Los Baños, Laguna, 4301 Philippines; Tel. (0973) 779-249.

Dr. Ralph D. Wahnschafft, Former Senior Economic Affairs Officer, United Nations, Emerging Issues Branch, Division for Sustainable Development, Department of Economic and Social Affairs (DESA), New York, NY 10017, USA; Goethestr. 24, D-14163 Berlin, Germany; Tel. +49 172 873 8606; E-mail: [ralph\_wahnschafft@yahoo.com](mailto:ralph_wahnschafft@yahoo.com).

Mr. John Yuen, Former Advisor to the President, SciVest Alternative Strategies Inc., 18 Ashglen Court, Toronto, Ontario M1T 3X3, Canada; Tel. (416) 494-6880; E-mail: [jhyyuen@rogers.com](mailto:jhyyuen@rogers.com).