

## Mary Kathryn ("MK") Campion, Ph.D., CFA, AIFA

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MK Campion is the Chief Investment Officer (CIO) and Director of Institutional Portfolio Management at Avior Wealth Management. She is responsible for client and strategy investment policies, private and public manager research and due diligence and trading activities. Campion is a member of the Securities Expert Roundtable ("SERs") and the Public Investors Advocacy Bar Association ("PIABA"). Prior to joining Avior, Campion was president and founder of Champion Capital Research, Inc. She has decades of experience as a financial economist and portfolio strategist and is considered an expert in fiduciary excellence and the design of asset allocation strategies for institutional investment portfolios. Campion conducts investment practice and performance examinations of defined benefit and contribution plans to

ensure investment policies and practices of public funds are consistent with ERISA and state laws and regulations. Campion is published in academic and professional journals including Bank Asset/Liability Management, The North America Journal of Economics and Finance, The World Economy: The Americas, and The TEXPERS Pension Observer. She is a Chartered Financial Analyst (CFA®) and an Accredited Investment Fiduciary Auditor (AIFA®). Dr. Campion holds Bachelor, Masters, and Ph.D., from Rice University and the University of Houston.

### EDUCATION and ADVISORY

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Bachelor of Arts – Rice University, Master of Arts – University of Houston

Doctorate: *An Empirical Investigation of the Determinants of the Cross-Border Financial Flows: Evidence on the Role of Capital Control and Financial Liberalization Policies*

Rice University Initiative for the Study of Economics Council Member - "RISE" – (2017 – present)

Center for Board Certified Fiduciaries (CBCF) - Curriculum Committee (2020-2024) Chairperson (2020-2022), Board Secretary

Houston Symphony Orchestra – Chair Pension Committee, Governance Committee, and Executive Board Member (2017-2025)

Prisoner Entrepreneurship Program (PEP), Executive Volunteer (2016-2019)

### SCHOLARSHIPS, FELLOWSHIPS, CHARTERS

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Dorothy Starling Full-Tuition Scholarship Recipient (Deans List)

RICE University

Graduate Fellowship & Shell Oil Foundation Scholarship Recipient

University of Houston

Chartered Financial Analyst (CFA)

Association for Investment Management and Research

Accredited Investment Fiduciary Auditor (AIFA)

University of Pittsburgh/Broadridge Financial

### FACULTY, INSTRUCTION

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**Rice University and Glasscock**

2008-2014

Economics, Finance, Equity and Fixed Income Theory and Strategy

Portfolio Management, Risk Management, CFP Curriculum

**Texas Public Employees Retirement Systems**

2001-Present

Instructor & Certified Trustee Training Curriculum Author, Education Committee

**Association for Investment Management and Research (AIMR)**

2004-2015

Retained Speaker for National CFA Society

**Center for Fiduciary Studies, Broadridge Financial**

2007-Present

Adjunct Faculty

### PROFESSIONAL DESIGNATIONS, MEMBERSHIPS, AND LICENSES

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CEFEX Analyst (2007- 2019)

Accredited Investment Fiduciary Auditor (AIFA) (2007-present)

National Association for Business Economists (NABE) (1998 – present) and American Economic Association (AEA)

Association for Investment Management and Research (CFA) (1997 – present)

Houston Society of Financial Analysts and San Diego Society of Financial Analysts

Uniform State Law (Series 63) (*retired*) and General Securities Representative (Series 7) (*retired*)

## PROFESSIONAL EXPERIENCE

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Chief Investment Officer	Avior Wealth Management, LLC
President & Litigation Expert	PIABA and SERS
Adjunct Instructor & Faculty	Rice University & Broadridge Financial
Chief Investment Officer	U.S. Fiduciary
Portfolio Strategist and Chief Economist	Coastal Securities, LLP
Director of Fixed Income Strategies	Government Securities Corporation
Senior Economist	Westcap Securities
Violinist	Houston Grand Opera and Ballet Orchestras

## SELECT PUBLICATIONS, CURRICULUM, PAPERS, LECTURES (partial listing)

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**Campion, M.K., Texas Pension Review Board (PRB) Public Fund Trustee Education Curriculum**, 2020 – present.

**Campion, M.K., Center for Fiduciary Studies Accreditation/Broadridge Financial Seminars**, Chicago, Denver, Boston, Houston, Dallas, St. Louis, Kansas City, Phoenix, Tucson, West Michigan, 2007-present.

**Campion, M.K., "TIME, for a Change"**, The Texas Pension Observer, Fall 2012.

**Campion, M.K., "Should Secular Trends Cause Changes in AA Policy?"**, The Texas Pension Observer, Fall, 2011.

**Campion Lecture: Inflation Real or Perceived**, Texas Government Finance Association, Fall 2011.

**Campion, M.K., "Is MPT Dead or Alive?"**, The Texas Pension Observer, Spring, 2010.

**Campion Lecture: Risk Management for MPT Believers**, NAPFA San Diego, Fall 2010.

**Campion, M.K., Accredited Investment Fiduciary Education and Certification Program**, Rice University and Center for Fiduciary Studies, 2009 – 2013.

**Campion Lecture: The Evolution of US and Canadian ETFs**, Quebec Finance Association, Canada, Spring 2008.

**Campion Lecture: Core Satellite and Enhanced Indexing**, Malaysia Finance Society, Fall 2007.

**Campion Lecture: Positioning Your Investment Portfolio for the Future**, AIG National Conference, Fall 2004.

**Campion, M.K., R. Neumann, "An Empirical Investigation of Controls in Latin America"**, The North America Journal of Economics and Finance, Volume 14, No. 2, 2004.

**Campion, M.K., R. Neumann, "Compositional Effects of Capital Controls – Theory and Evidence"**, The World Economy: The America's, Vol. 26, August 2003.

**Campion, M.K., "The Derivation of Expected Returns and Volatilities for Model Portfolios"**, Working Paper, October 2002.

**Campion, M.K., "The Globalization of Financial Markets: How Controls and Policies Affect the Allocation of Financial Capital"**, Working Paper, October 2001.

**Campion, M.K., "New Regulations in Capital Management: Pricing Embedded Options in Floating-Rate CMO Portfolios"**, Bank Asset/Liability Management, Vol. 12, No. 8, August 1996.