

## EXPERIENCE

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### UNITED INCOME

Washington, DC

*Vice President, Head of Investments*

*June 2017 – Present*

Joined technology startup to lead the investments and trading business with a mission to help retirees extend the life of their money. Designed personalized investment portfolios and trading processes with low-cost ETFs. Significantly contributed to business development efforts bringing in over \$230M in our first 3 months. Our aggregate portfolio has outperformed its benchmark every month to date.

- Created investment portfolios for retails and 401K clients, developing investment thought leadership
- Oversee the portfolio management and trading of \$50M in ETF portfolios and \$180M in 401K advisory business
- Represent the company in media and at conferences speaking about our investment approach and methodology
- Member of the management and strategy committee, developing and executing on growth objectives

### DIMENSIONAL FUND ADVISORS

Sydney, Australia

*Portfolio Manager*

*July 2012 – March 2017*

Managed developed and emerging market equity portfolios. Issued equity and FX trades, built technology to visualize portfolio performance, presented at investment conferences and managed team of 7 across Sydney & Singapore.

- Managed equity portfolios over \$4B – target small, value and momentum in developed and emerging markets
- Collaborated with Co-CIO and CEO to launch a New Zealand equity fund and a sustainability equity fund
- Presented at financial advisor and institutional conferences on foundations of equity/fixed income investing
- Managed team of 7 analysts who are tasked with delivering and reconciling cash, corporate actions and trades

### KEY PERFORMANCE IDEAS & TITAN TECHNOLOGY PARTNERS

Chicago, IL

*Technology Consultant*

*September 2008 – May 2012*

Led technology projects to improve budgeting and financial reporting process with Oracle Hyperion. Advised corporate and government CFO's and CTO's on technology best practice for annual planning and reporting process. Managed project budgets of \$1.1M, \$750K and \$250K.

### BANK OF AMERICA

Charlotte, NC

*Senior Risk Analyst*

*July 2007 – August 2008*

## EDUCATION

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### THE UNIVERSITY OF CHICAGO BOOTH SCHOOL OF BUSINESS

Chicago, IL

*Master of Business Administration*

*May 2012*

- Concentrations in Analytic Finance, Economics, Entrepreneurship & Econometrics/Statistics
- GPA: 3.7, GMAT: 710, Graduated with Honor's - Dean's List for six consecutive quarters

### CARNEGIE MELLON UNIVERSITY

Pittsburgh, PA

*Bachelor of Science*

*May 2007*

- Major in Mechanical Engineering, concentration in Entrepreneurship
- Cumulative GPA 3.3, SAT: 1390 of 1600, Dean's List for three semesters
- All-American in the 1500 meter run (finished 2<sup>nd</sup> in the country at NCAA DIII nationals)
- Internship at The Boeing Company as student engineer, resolving defects in post-production aircraft

## ADDITIONAL INFORMATION

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- **Technical:** Python, R, Matlab, SQL, MySQL, VBA and Oracle Hyperion Suite
- **Continuing Education:** Udacity Machine Learning Engineer Nanodegree, Worldview Stanford Science of Decision Making, Coursera Machine Learning, Coursera Understanding the Brain
- **Additional Employments:** Economic Advisor on Illinois Trade Mission to China (2011), Delegate to the Democratic National Convention (2012), VP of the Booth Australia Alumni Association (2012-2017)