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SUMMARY

- Over 15 years of experience in the financial services industry with expertise in investment management, strategic planning, financial modeling (NPV, IRR, ROI, DCF, etc), and conducting presentations to senior management, research, budgeting, forecasting, security analysis and portfolio management.
- Founder of investment advisory firm specializing in managing equity based portfolios for individuals.
- Served as an associate/ consultant with top tier investment bank and Big 4 accounting/consulting firm.
- Well versed in market research processes, including due diligence, mining demographic, economic and statistical data, and data analysis and compilation.

WORK HISTORY**Brick Financial Management** (<http://www.brickfinancial.com>) – Short Hills, NJ

Founder/Investment Manager -- 2003 to present

Establish an investment strategy selecting appropriate investments of stocks, bonds, and funds based on client needs. Make decisions on what percentage of portfolio to allocate to which security/strategy. Counsel clients on general financial issues and review investment strategy and performance results. Created and implemented all marketing materials and presentations for the firm, including, the firm website, client presentations and newsletter articles. Conduct seminars on topics including but not limited to personal investment strategies, styles of investing, asset allocation, managing risk in a portfolio, time value of money, college savings plans, retirement plans, how to read financial pages, and investing habits of wealthy households.

Lehman Brothers (<http://www.lehman.com>) -- New York, NY

Associate/ Senior Associate -- 1997 to 2003

Specialize in executing specific portions of projects involving research, data collection, and recommendation formulation for Financial Control & Analysis group. Create and manage financial models to ensure liquidity management. Responsible for financial activities, including reporting to CFO & Treasury, investigating balance sheet variances, preparing forecasts in support of controller group, implementing internal controls, and serving as liaison to outside auditing firms.

KPMG (<http://www.kpmg.com>) -- New York, NY

Senior Analyst/ Associate -- 1995 to 1997

Advise clients in areas of efficiency, effectiveness, consolidation, intergovernmental cooperation, and privatization alternatives for delivery of services. Assist clients with strategic financial plans, budgeting, cost management processes, cash management and cost/benefit analysis. Primarily responsible for data collection through client and industry interviews, project analysis, and development of recommendations and solutions.

Public Financial Management (PFM) (<http://www.pfm.com>) – Philadelphia, PA

Analyst -- 1994

Advise local and state government clients in the areas of strategic planning, debt management and bond issuances. Assisted in providing investment advice and portfolio management services to governments, not-for-profit organizations, pension funds and other institutional investors.

HIGHLIGHTS

- Implemented Brick Financial's investment strategy on behalf of clients. Achieved since inception annualized returns as of December 31st, 2007 of 17.9% versus the benchmark's (S&P 500) return of 11.3%.
- Developed Brick Financial's corporate website and newsletter. <http://www.brickfinancial.com>
- Published articles for several investment/special interest oriented websites including stockblogs.com, vinvesting.com, seekingalpha.com and blacknj.com.
- Built Brick Financial's weblog ([The Third Pig](#)) from a subscriber base of less than 50 to well over 1,000 in less than a year.
- Various projects as independent consultant working with some of the top organizations and non-profits in the country including: The Bill and Melinda Gates Foundation and Prudential Financial.
- Initiated implementation of Lehman's intranet for use in management of the firm's fixed income reserve.
- Assisted in finding areas of unallocated interest, re-engineering Lehman Brothers' long-term debt allocation methodology.

- Performed daily tracking and forecasting of the debt borrowing patterns of Lehman Brothers' business units.
- Performed feasibility analyses for United Parcel Service's (UPS) Information Systems group. Executed NPV analysis for e-commerce initiatives such as UPS Online and UPS Tracking.
- Performed cost-benefit analysis for Lipton's Dressing division, a subsidiary of Unilever. Developed a model to assist the Marketing and Brand Management teams pinpoint slow selling and low profit items by size, type and placement.
- Performed a business process analysis for clothing retailer. Made cost management recommendations designed to improve tracking and control of administrative operating expenses.
- Singularly executed business process and organization improvement of several departments (Purchasing, Warehousing, and Facilities Management) of the Newark (NJ) School System after the state's seizure of the system's administration. Analysis provided the client with several million dollars saved and an improved business method.
- Performed an Activity Based Costing analysis for the City of New York's Department of Sanitation. Analysis was used as a primary determinant in the decision to privately contract sanitation services for the City.

EDUCATION & DESIGNATIONS

- BA: Lehigh University (1993)
- Registered Investment Advisor (RIA), NASD License: Series 65
- Chartered Financial Analyst (CFA) candidate: CFA Institute, (in process)
- Certificate in Financial Planning: The American College (in process)

TECHNOLOGIES

- Familiarity with Axys and Moxy; Skilled in Microsoft Office (Windows, Word, Excel, PowerPoint, Access, Outlook, Frontpage & Publisher); Hyperion, Hyperion Retrieve, Bloomberg, Compustat, Edgar; Database and Internet Applications: XHTML, HTML, ASP, MySQL, PHP, CSS; JavaScript, Adobe Creative Suite

ACTIVITIES

- National Association of Black Accountants, Member 2002 to present
- National Foundation for Teaching Entrepreneurship, Volunteer 1999 to 2003