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CAREER SUMMARY

Professor of Practice of Finance, leveraging extensive and successful career as Senior Securities Analyst and Portfolio Manager, specializing in Financial Planning, Investment Management, and Financial Statement Analysis to educate and mentor students and executives. Reputation as an innovative, resourceful team player and instructor skilled in presenting both fundamental and sophisticated concepts. Known as a fierce program champion and mentor for undergraduate and graduate students, with a strong, vibrant and broad professional network.

PROFESSIONAL EXPERIENCE

Fox School of Business, Temple University, Philadelphia, PA
Associate Professor of Practice, Deputy Finance Department Chair, Director of Financial Planning Programs, Director of Owl Fund, 2012 to Present

- Co-manage day to day operations of Finance Department Faculty and Staff and serve as liaison between faculty, advisors, students and administrators. Facilitate department curriculum review, revision and development. Assist with scheduling and curriculum planning and coordinate academic and professional student development for undergraduate and graduate finance majors. Represent department at various on campus and virtual events for students, faculty and university matters.

- Developed, launched, marketed and implemented financial planning BBA curriculum fully mapped to CFP Board domains. Received verbal approval of program from CFP Board within 24 hours, and written approval within 48 hours. Doubled enrollment within two years in Financial Planning from the previous 12 months, with strong ongoing interest from the student body.

- Established Professional Speaker Series and Student Professional Organization focusing on Financial Planning, Investment Management and Women in Finance that bring over 100 industry professionals to campus each academic year, and allows students to meet, learn from, and network with leading practitioners.

- Raised $1,000,000 in funding used for the Financial Planning Training Center and Experiential Classroom, scholarships and student programming, increased visibility and reputation of the Fox School of Business and defrayed the cost of tuition for students. Procured ongoing digital subscription through the Schwab Foundation to Barron’s for all students and faculty within the Fox School of Business, aiding professional development and for usage within the classroom. Awarded $500,000 scholarship from Charles Schwab Foundation for students of color, one of seven universities to receive this scholarship.

- Established FPA Career Day at Temple University designed to connect 30 employers to 70 students at 7 local universities for internships and full-time employment opportunities post-graduation. 75% of students received second and third interview opportunities.

- Lead Student Managed Investment Fund, a competitive, credit bearing two-semester class that enables students to attain hands on securities analysis and portfolio management experience. Superior investment performance led to doubling of assets under management via University and private donations. 100% student placement for internships and jobs post-graduation.

- Develop and teach Portfolio Management, Alternative Investments, Financial Markets and Institutions, and Financial Statement Analysis courses to over 100 domestic and international graduate students in specialized masters programs for MBA and MS programs, as well as CFA and CPA designations.

Glenmede Investment Management, LP Philadelphia, PA
Vice President/Securities Analyst, 2002-2012

- Applied seasoned experience in small/mid/large capitalization stocks and introduced new equity ideas outside the S&P 500 universe to portfolio managers. Devised an investment framework/thesis for stocks that outperformed respective benchmarks.

- Performed financial screening methodologies, incorporating market capitalization, trading liquidity, revenue and earnings estimates and trends, balance sheet, income statement and cash flow analysis. Interviewed company management as well as competitors, customers and suppliers to discover information not readily available.

- Distilled and analyzed information, prepared and updated easy to understand quarterly reports presented at formal/informal meetings with internal and external clients.

Blackrock Financial, Wilmington, DE
Vice President, Co-Manager of Small Cap Value Fund, 2000-2002

- Co-managed $2B small capitalization mutual fund and served as healthcare/consumer sector specialist for $1B mid cap fund using value investment disciplines.

- Initiated buy/sell/hold ideas for direct sector responsibilities and for junior team members. Devised screening methodology to discover undervalued small/mid cap securities on an ongoing basis to develop portfolio structure. Screened on trailing 12-month earnings, forward 12-month estimates, price to cash flow and free cash flow yield using balance sheet, income statement and cash flow analysis.

1838 Investment Advisors, LP (Acquired by MBIA, Inc.) Radnor, PA
Principal, Co-Manager of Small Cap Value Fund, 1995-2000

- Co-managed small capitalization portfolio and mutual fund, generated buy/sell ideas, educated and persuaded clients resulting in asset growth of $2B utilizing value investment disciplines.

- Constructed quantitative screening methodology using FactSet database; augmented low P/E valuation screen with quantitative framework. Developed user-friendly screens that were available anytime to identify timely and objective buy ideas. Distilled initial investable universe of 2000 stocks, to a manageable 200.

Friess Associates, Greenville, DE
Security Analyst, 1992-1995

- Conducted growth and momentum investment strategy coupled with fundamental analysis for small/mid/large cap mutual funds and client assets.

Provident Capital Management, (now known as PNC Advisors), Philadelphia, PA
Assistant Vice President, 1985-1992

- Advanced from Trainee to Co-Portfolio Manager, generating buy/sell/hold investment ideas for institutional clients and internally managed mutual funds. Evaluated suitable investments of small cap equities and IPOs. Met with corporate management teams of publicly traded companies regularly to keep abreast of changes in fundamental business activities.

EDUCATION

Drexel University, Philadelphia, PA
Master of Business Administration, Concentration in Investment Management
Bachelor of Science in Finance

PROFESSIONAL DEVELOPMENT

Chartered Financial Analyst, 2000
Online Teaching Certification
Completed Certified Financial Planning educational requirements to sit for CFP exam
Annual Schwab IMPACT, TD Ameritrade LINC, Commonwealth Financial conferences
Conference panel and presentations to FPA, CFA Society of Philadelphia, CAIA and NAPFA
Various interviews with the Media

TEACHING AWARDS

MSIM Faculty of the Year, 2014
Andrisani-Frank Teaching Award, 2017

AFFILIATIONS

CFA Society of Philadelphia
CFA Institute
Financial Planning Association Tri-State Philadelphia Board Member, Career Development Board Position
Women in Investment Network

PRESENTATIONS:

Chartered Alternative Investment Analyst Association, February 2020, "Diversity and Inclusion"

National Association of Personal Financial Advisors, October 2018, "Financial Planning Industry and Financial Planning Majors: Shaping the Industry for the Next Generation"

Financial Planning Association of Tri-state Philadelphia, December 2018, "Diversity and Inclusion within the College Community"

CFA Society of Philadelphia, March 2019, "Diversity and Inclusion within the Investment Management Industry"

GRANTS:

- $500,000 – Charles Schwab Scholarship
- $252,000 - Charles Schwab Financial Planning Training Center (Alter 231)
- $352,000 - Charles Schwab Virtual Meeting Conference Room (1810, 4TH Floor.
- $250,000 - Owl Fund contribution from Temple University Endowment Fund
- $ 25,000 - TD Ameritrade Emerging Financial Planning BBA
- $ 25,000 – Merrill Lynch Financial Planning Scholarship
- $100,000 – Annual Douglas Maine/Fox Wall Street Day
- $100,000 – Roy T Diliberto Financial Planning Scholarship
- $4.5 million – Charles Schwab Foundation/Barron's.com Subscription

PUBLICATION:

I have written a paper for publication in the *Journal of Financial Planning* that details the process of developing and implementing a BBA in Financial Planning. The *Journal of Financial Planning* has expressed interest in publishing it, noting that nothing has been written or published on the topic. I am currently editing it to include best practices for pivoting online during the COVID pandemic.

I am completing a Financial Planning case study, potentially for publication with Ivey Publishing. I have asked Professor Thomas Intoccia to collaborate on this project as it will be useful for FIN 4598, Senior Seminar in Financial Planning. There are very few Financial Planning case studies that have been published within academia.

SERVICE:

<u>Current Activities</u>

Development of BBA in Financial Planning, 2015 to present

Developed, launched, marketed and implemented financial planning BBA. Appointed as Academic Director of Financial Planning. The curriculum is fully mapped to Certified Financial Planning Board domains, meaning that Fox graduates have completed the educational requirement to take the Certified Financial Planning exam. Received verbal approval of program from CFP Board within 24 hours, and written approval within 48 hours. Achieved 15% sequential student enrollment, following 100% enrollment growth in Financial Planning major from previous 12 months, with strong ongoing interest from student body. Procured and integrated eMoney financial planning software at zero cost. This program is reviewed and revised annually, as required by the CFP Board annually.

Development of MS in Wealth Management, 2020 to present

Assisting in the development of an MS CFP Board Registered Program for professionals looking to obtain an MS degree and complete the educational requirements to take the Certified Financial Planning exam. Ideally, this will be presented to the Masters Programming Committee in Fall 2021 and launched Fall 2022.

Networking Liaison, Finance Department, 2013 to present

Identify and maintain corporate relationships with Fox Finance Department, connecting students to Investment and Financial Planning professional and professional community. On average, identify 100 internships and full time positions each academic year.

Media interviews, 2013 to present

Speak to multiple media sources on relevant topics in Finance, Investment and Financial Planning. Sources include 6ABC Philadelphia, Nerd Wallet, *The Philadelphia Inquirer,* NBC, *The Philadelphia Business Journal* as well as internal Fox interviews and videos.

Panelist and Conference Speaker

Speak and present at numerous industry conferences and panels including SEI Corporation, the CFA Society of Philadelphia, CAIA, Women In Investing Network, National Association of Professional Financial Advisors, as well as internally marketed videos for the Fox School of Business

Faculty Advisor, Temple University Financial Planning Association: 2015 to February 2020

Develop programming and launched Student Professional Organization for Financial Planning majors. Procure 20 speakers each academic year. Student membership now at 70 members.

Faculty Advisor, Temple University Women in Finance: **2018 to present**

Assist students in the development and launch of Fox School of Business Finance Affinity Group. Procured five speakers designed to facilitate networking with female finance professionals. Ammual membership is 100+ students.

Finance Week, Fall Semester: 2014 to present

Develop, coordinate and lead full week of activities , sponsored by Vanguard, for students including speakers, FPA Career Day and networking events.

Finance Week, Spring Semester: 2014 to present

Develop, coordinate and lead full week of activities for students including speakers and panelists for FMA, TUIA and FPA as well as and networking events. This year, Spring 2019, I also procured Behavioral Finance speaker for WebEx for MSIM and Graduate students. This week- long event was historically been sponsored by Brinker Capital and raised $3,000. Despite being cancelled last year due to COVID-19, it was successfully hosted this year online. While Brinker was unable to financially sponsor the event, they were able to provide a full roster of speakers for our event.

Student Mentor: 2013 to present

Mentor Finance and Financial Planning majors regarding internship, full time and career decisions as well as interview preparation and resume review.

Summer Independent Study – Owl Fund 2013-present

Mentor 2-4 students each summer for maintenance of Owl Fund portfolio. Monitor portfolio for stock movement, earnings reports, analyst events, news events etc. to ensure integrity of the William C. Dunkelberg portfolio May-August while school is not in session.

Wall Street Day: 2013 to present

Initiated and coordinate annual trip to New York City for panel of 6 esteemed Temple Alumni who work on Wall Street to demonstrate the value of a Temple education to approximately 80 undergraduate Owl Fund students, MSIM students, and MBAs. This event was successfully held virtually during October 2020.