

# JOHN H. SMITH

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## FINANCIAL PROFESSIONAL

*Portfolio Manager ~ Equity Research ~ Financial Operations*

***High-impact change agent with a significant ability to identify initiatives and facilitate action-driven plans to support financial growth and objectives.***

Performance-oriented professional with comprehensive portfolio, investment, and financial operations experience. A successful record of developing customized financial strategies and solutions to meet the needs of clients and able to diagnose and report issues to return organizations to economic stability. Managed multiple portfolios with diligent attention and continual analysis of economic trends to determine appropriate asset allocation. Successful in evaluating business and investment opportunities, quickly understanding companies and their markets. Excellent communication and organizational skills, able to multitask and set priorities to maximize potential. Strong work ethic with capacity to function well under pressure and display a high level of competence in a rapidly evolving work environment.

### NOTABLE SKILLS & ACCOMPLISHMENTS

- ◆ Provided financial expertise and oversight to support operations and resolve challenges including restricted fund management, forecasting, budgeting, and financial transactions.
- ◆ Contributed significantly to management; evaluation and continual monitoring of institutional and high net worth individual accounts with two First Star 4-Rated large cap value equity funds with total combined value of \$3.5 billion.
- ◆ Researched and recommended stocks within the top five holdings as measured by a percentage of the portfolio's assets.
- ◆ Strengthened financial position of nonprofit operation by implementing new procedures, quality control measures, and by ensuring compliance with federal and IRS laws to protect nonprofit status.

### PROFESSIONAL HISTORY

GLOBAL MISSIONARY CHURCH, Dallas, TX

2006 – Present

#### ***Finance Administrator***

Direct all aspects of financial operations and restricted internal financial platform by initiating accurate reporting, evaluating procedures and executing analysis of financial data. Assessed operations and reviewed detailed analysis to maintain 501c3 status. Met IRS audit requirements and implemented long-term strategy to project a healthy financial outlook.

- ◆ Eliminated debts, analyzed and reduced operational expenses, and overhauled cash management and accounting practices; outsourced payroll functions and replaced staff with qualified professionals.
- ◆ Increased revenue sources and defined baseline foundation to eliminate income volatility and improve overall financial foundation.
- ◆ Manage staff of four employees; make regular reports and presentations to Senior Management including budget formation, projection and review; capital campaign reviews, income statement preparation for grant applications regarding Missionary Community Development Organization (MCDO) and asset utilization analysis.
- ◆ Hold responsibility to oversee financial activities for auxiliary ministries.

MARYLAND INVESTMENT ASSOCIATES, Dallas, TX

12/2004 – 08/2010

#### ***Vice President, Senior Portfolio Manager of Large Cap Value***

Charged with collaborating with a team of seven to manage and assess design of equity investments with primary responsibility for research in the Consumer Staples sector and providing co-coverage of the Consumer Discretionary Sector and generalist coverage responsibilities for other sectors.

## PROFESSIONAL HISTORY *(Continued)*

### MARYLAND INVESTMENT ASSOCIATES

*(Continued)*

Handled reporting to constituencies such as; institutional consultants, internal management, head of equity investments, institutional manager consultants; current and prospective clients.

- ◆ Achieved investment goals by developing comprehensive research reports on macroeconomics and other relevant data; built financial models for individual stock recommendations.
- ◆ Built relationships with investor relations personnel and management companies.
- ◆ Interviewed company management teams and made presentations regarding investment research and regularly collaborated with sales force team.
- ◆ Worked with Technology Department to facilitate transition of team's proprietary research to a shared-drive network database, ensuring integrity of all data.
- ◆ Responsible for executing trades across client accounts and generated revenue growth by ensuring current allocations were appropriate.
- ◆ Held supervisory responsibilities regarding activities of a Summer Intern.

### GLOBAL EQUITY PARTNERS, Dallas, TX

2001 – 2004

#### ***Equity Research Associate, U.S. Active Large Cap Value***

Selected as one out of 45 Analysts from the Global Analyst Program to secure one of two Analyst positions within the equity department. Orchestrated financial, statistical, and industry analysis on key companies to support investment process. Created financial models for recommendation of buy/sell targets for Portfolio Management Team of five charged with directing \$10 billion in client assets using company reports, senior management meetings, peer meetings, and conference calls.

- ◆ Worked in partnership with Senior Portfolio Managers to perform critical research for valid recommendations regarding portfolio management.
- ◆ Led team of 15 Analysts in a community service education project which collected 850+ books for Dallas Public Library within four weeks.

#### ***Sponsors for Educational Opportunity (SEO) Relationship Manager (2002 – 2004)***

Chosen by Human Resources Director to serve as the liaison between Global Equity Partners and SEO organization.

- ◆ Attended recruiting events to identify candidates for three internal analyst programs.

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## EDUCATION

### STATE COLLEGE OF TEXAS, Dallas, TX

#### ***Bachelor of Science in Finance, Minor: Economics***

- ◆ Presidential Scholar
- ◆ Honor Societies Financial Management Association, The National Honor Society in Finance & Omicron Delta Epsilon~ The International Economics Honor Society

### BENDEL UNIVERSITY, Hartsdale, United Kingdom, Henry Term

#### ***Academic Focus: International Financial Markets & the Economic Development of Third World Countries***