GERALD E. O'HARA, CFA

gerald.ohara@mba10.mccombs.utexas.edu

2411 Hartford Rd • Austin, TX 78703 • (203) 394 - 7696

EDUCATION

THE UNIVERSITY OF TEXAS AT AUSTIN, **McCombs School of Business** - Austin, Texas **May 2010**

Master of Business Administration, Full-Time Program

- Concentration in Finance; Specialization in Asset Management
- Member - Graduate Business Council; Member - Graduate Finance Association

LYNCHBURG COLLEGE - Lynchburg, Virginia **May 2000**

Bachelor of Arts in Finance

- Honors Program: *magna cum laude*

EXPERIENCE

MBA INVESTMENT FUND, LLC – Austin, Texas **2008 - Present**

Portfolio Manager, Risk Manager (Team Leader)

- Delivered a comprehensive report on the domestic insurance industry analyzing the macroeconomic environment, industry trends, and company-specific fundamentals; implemented investment recommendations based on findings
- Presented current industry analysis and stock-specific investment recommendations in an investment committee format; findings are used by portfolio managers to support active management of the portfolio
- One of twenty-one students selected through a formal application and interview process to actively manage value, growth, and fixed-income portfolios with approximately $11.5MM assets under management

TEACHER RETIREMENT SYSTEM OF TEXAS – Austin, Texas **Summer 2009**

Summer Associate

- Covered European REIT stocks and global developed insurance industry; recommended best ideas for inclusion into the $40B equity portfolio; examined the residential and commercial mortgage markets, including country-specific regulatory issues
- Collected and analyzed investment portfolio data across developed global insurance industry; focused on toxic asset exposure such as CMBS, CDO/CLO, and vintage products

CHARLES SCHWAB & CO., INC. – San Francisco, California **2007 - 2008**

Portfolio Manager

Senior Manager, Investment Research

- Evaluated and recommended value focused money managers to other members of mutual fund advisory committee for $4.5B Schwab Managed Portfolios; Schwab's mutual fund wrap product
- Developed qualitative analysis and utilized proprietary quantitative screens to review existing and potential money managers on $2B Managed Account platform and $15B Mutual Fund Select platform
- Interviewed over 100 managers and their teams to evaluate philosophy, process, sustainability and overall competence; focused on finding consistent alpha generators with a unique edge

MANAGERS INVESTMENT GROUP, LLC. – San Francisco, California **2002 - 2007**

Vice President, Product Portfolio Manager (2007)

- Monitored cash flows for $1.1B Managers Special Equity Fund and $140M Fremont Global Fund, rebalancing target asset allocation
- Advised the Fremont Group on its $100M retirement plan, presenting quarterly performance reviews and economic updates

Assistant Vice President, Assistant Portfolio Manager (2005 - 2006)

- Wrote and published quarterly and annual commentary for 6 multi-managed and 10 fixed income funds across a platform of over 20 sub-advised mutual funds and separately managed accounts (SMAs)
- Assisted lead portfolio manager on $500M Managers Fremont Money Market – MFMXX

CHARLES SCHWAB & CO., INC. – Jersey City, New Jersey **2001**

Capital Markets and Trading Associate

- Completed sales and trading rotational program on fixed income, institutional sales, and OTC desks

ADDITIONAL

- Awarded CFA Charter in September 2009, Member of the CFA Institute and CFA Society of San Francisco; Series 7, 66, 55 (FINRA)
- Publication: "The Efficiency of Ratio Analysis for Individual Investment Purposes." The Journal of Business and Economic Perspectives, Spring 2001
- Positive Coaching Alliance (PCA), Lynchburg Men's Basketball, 1996-2000; Captain: 1998-2000, The Olympic Club, Kilimanjaro 2009
- **Citizenship:** United States