

# Jody Farquhar

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## EDUCATION

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

**Master of Business Administration**, Full-Time Program

- Concentration in Finance; GPA 3.5; GMAT 690
- McCombs Graduate Finance Association; Texas MBA Hedge Fund Association

**UNIVERSITY OF NORTH TEXAS** - Denton, Texas **August 1999**

**Bachelor of Business Administration**

- Concentration in Economics, *cum laude*, 3.8 GPA

## EXPERIENCE

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**Cimarron Asset Management** – Irving, Texas **2009**

**Equity Analyst**

- Analyzed investment opportunities in a variety of sectors for large-cap, small-cap, and socially responsible portfolios
- Established models for analysis of Materials Sector with a focus on hard commodities

**MBA Investment Fund, LLC** - Austin, Texas **2008 – Present**

**Portfolio Manager**, Consumer Discretionary and Staples Sectors

- One of eighteen students selected through a formal application and interview process to actively manage value, growth, and fixed-income portfolios with total assets under management of approximately \$11.5 MM
- Deliver comprehensive reports on the domestic Food & Staples Retail industry analyzing macroeconomic environment, industry trends, and company-specific fundamentals; implement investment recommendations based on findings
- Present current industry analysis and stock-specific investment recommendations in a morning meeting format
- Author bi-weekly report on macroeconomic trends relevant to the Consumer Industries

**Penson Financial Services** – Dallas, Texas **1999 – 2008**

**Team Lead, Margin Department** (2007 - 2008)

- Decreased risk to company by implementing a plan to add descriptive notes to account transfer claims, making originating broker and all departments aware of claims so customers could not access funds they did not have
- Collaborated with management and programmers to develop buying power figures to match house maintenance figures, resulting in fewer erroneous margin calls and increased customer satisfaction
- Performed risk and trading analysis for account debits totaling \$800 MM

**Team Lead, Team Penson** (1999 - 2005)

- Promoted to team lead within 13 months of hire, as a result of outstanding analytical ability and drive
- Reduced uncollectible negative equity balances by \$100 M in six months by restructuring daily timelines and assisting programmers with the development of new risk reports
- Implemented guidelines requiring approval for stock certificate requests by the Margin Department or Team Lead, resulting in company's financial risk being reduced by millions

**Jefferies and Company** – Dallas, Texas **2005 – 2007**

**Retail Trading Analyst**

- Responsible for risk and trade analysis of accounts with debits totaling \$500 MM
- Assigned to manage account with \$300 MM in option requirements within two months of employment and established daily settlement procedures which greatly reduced firm risk
- Developed a reputation for building strong correspondent relationships through increased communication and proactive proposals

## ADDITIONAL

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- CFA Level II Candidate
- Member: CFA Institute; CFA Society of Dallas-Ft. Worth
- Auto Racing Enthusiast; Competitively Driven in Autocross, Road Course, Drag Racing Events
- Operation Kindness Animal Shelter Volunteer
- **Citizenship:** United States