

MICHAEL PREIS

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EDUCATION

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

Master of Business Administration, Full-Time Program

- Concentration in Investment Management
- 1st Place Fall 2008 Finance Challenge Case Competition (30 teams)
- Member: Graduate Finance Association

THE UNIVERSITY OF SOUTHERN CALIFORNIA, Marshall School of Business - Los Angeles, California **May 2003**

Bachelor of Science in Business Administration

- Concentration in Finance

EXPERIENCE

EMPLOYEES RETIREMENT SYSTEM OF TEXAS - Austin, Texas **Summer 2009**

Summer Analyst – International Equities

- Developed and presented a global renewable energy industry report to the Director of Public Equities and International Equities Portfolio Manager; evaluated regulatory initiatives, market trends and outlook, and country-specific factors that affect stock price behavior
- Authored industry reports for the Brazilian homebuilder and for-profit education industries; established findings that were used to support the investment selection process for a newly created emerging markets portfolio

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

Portfolio Manager, Healthcare Sector

- One of twenty-one students selected through a formal application and interview process to actively manage value and growth portfolios with total assets under management of approximately \$11.5MM
- Deliver comprehensive reports on the domestic Healthcare 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; findings are used by industry specialists to support active management of the portfolio
- Author bi-weekly report on macroeconomic trends relevant to the Healthcare industry

E*TRADE FINANCIAL - Beverly Hills/Torrance, California **2004 - 2008**

Branch Manager – Torrance, CA (2006 – 2008)

- Validated asset allocation policies made by 2 Financial Advisors to clients with portfolio sizes of up to \$1 Million; developed understanding of client investment profiles and evaluated recommendations based on investment style
- Led the opening of new branch office after only 18 months with the company; hired; trained; and provided ongoing performance management for 5 employees
- Coached team around sales strategies in order to meet client retention and growth goals; achieved a 97% client retention rate for 2007 and 2008 YTD, which ranked in the top quarter of all company branches
- Received the 2006 President's Award for demonstrating exemplary performance and leadership towards company goals; given to the top 2% of employees company-wide

Relationship Manager – Beverly Hills, CA (2004 - 2006)

- Directed investment-savvy clients on the use of E*TRADE's active trader platforms, enabling them to implement technically and fundamentally driven trading strategies without leaving E*TRADE's website
- Exceeded asset growth goals in three out of five quarters between Q1 2005 and the end of Q1 2006, attaining 200% of goal in Q3 2005 and 128% of goal in Q1 2006 by providing needs-based solutions to clients

ADDITIONAL

- CFA Level II Candidate – June 2010
- Completed Nike Human Race 10K in the top 5% of 15,000 runners
- Surfed a variety of surf breaks throughout California, Mexico, and Costa Rica
- **Citizenship:** United States