CHASE M. BASTA, CFA

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EDUCATION

THE UNIVERSITY OF TEXAS AT AUSTIN, McCombs School of Business, Austin, TX **May 2014**

Master of Business Administration, Full-Time Program

- Concentration in Investment Management; GPA: 3.91; GMAT: 770
- Hicks, Muse, Tate, & Furst Scholarship recipient

MONTANA STATE UNIVERSITY, Bozeman, MT **May 2008**

Bachelor of Science in Business Administration

- Majored in Finance
- Graduated with honors; GPA: 3.63

EXPERIENCE

MBA INVESTMENT FUND, LLC, Austin, TX **2012 - Present**

Private, student-run investment company

Portfolio Manager, Financial Services and Real Estate

- Selected through a formal interview and application process to be one of fifteen students charged with actively managing value and growth portfolios totaling approximately $17M
- Researched investment ideas and performed analysis using Bloomberg, FactSet, and Capital IQ; formally pitched to advisors

THE WORSHAM GROUP, Gatlinburg, TN **2011 - 2012**

Investment firm focusing primarily on real estate acquisition and development

Financial Consultant

- Created robust valuation models for real estate investment/development projects as large as $50M, effectively allowing partners to evaluate the desirability of alternative capital structures
- Consulted with CEO on additional business matters, including preparing underwriting packages and the potential acquisition of a significant equity stake in a $350M troubled financial institution (after employment with the FDIC ended)

FEDERAL DEPOSIT INSURANCE CORPORATION (FDIC), Knoxville, TN **2008 – 2012**

Financial Institution Examiner, Capital Markets Subject Matter Expert (Division of Risk Management Supervision)

- Led and supported teams of 10-20 individuals in completing onsite, comprehensive risk and performance analysis at more than 50 banks during the aftermath of the financial crisis
- Selected to instruct the FDIC's Asset Liability Management School in Washington, DC, a course focusing on interest rate risk and liquidity risk analysis and modeling
- Earned formal designation as office Capital Markets Subject Matter Expert
- Recognized 7 times by peers with awards for exceptional performance with regard to efficiency, analytical performance, teamwork, and professional conduct during high-stakes and adversarial communication situations
- Mentored junior colleagues

Financial Institution Specialist

- Completed a 3-year in-depth training program in areas including credit risk analysis, financial institution analysis, interest rate risk modeling, corporate governance, GAAP, and effective leadership; first in training class of approximately 35 individuals to earn a commission in the Division of Risk Management Supervision
- Identified previously unrecognized problems, including the substandard credit quality of a $600M bank's largest borrowing relationship, interest rate risk resulting from improperly structuring warehoused mortgage loans at a $120M bank, and poor balance sheet structure decisions resulting from improperly modeling financial instruments at a $13B bank

ADDITIONAL

- **Certifications:** Chartered Financial Analyst (CFA®) charterholder
- Member: CFA Society of Austin
- Attended a Financial and Valuation Modeling course taught by Wall Street Prep in November of 2011 and a Financial Modeling workshop taught by Training the Street in February of 2013
- Scholarship Navy ROTC Midshipman at the University of Arizona from 2003 to 2005 (honorable medical discharge)
- Competed in the 2012 World Series of Poker in Las Vegas, NV