CURRICULUM VITAE

MICHAEL SURY

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Legal Name: Sharath M. Sury
Department of Finance
McCombs School of Business
The University of Texas at Austin
Austin, Texas 78712-1179

EDUCATION

The University of Chicago, Chicago, Illinois
Degree: Master of Business Administration, Finance & Statistics, 1995
Symposium Thesis: *"The Regulatory Economics of Glass-Steagall"* (Advisor: Merton Miller, PhD)
Honors: High Honors, Beta Gamma Sigma, 3.9 GPA

The University of California, Santa Cruz, California
Degree: Bachelor of Arts, Economics, 1992
Senior Thesis: *"The Collapse of the Japanese Stock Bubble and Investment Loss Compensation"*
(Advisor: Michael Hutchison, PhD)
Honors: Highest Honors, College Honors, Phi Beta Kappa, 4.0 GPA

ACADEMIC APPOINTMENTS

Managing Director, Center for Analytics and Transformative Technologies, The University of Texas at Austin (2020 -)
Program Director, MSBA Financial Analytics Track, The University of Texas at Austin (2020 -)
Lecturer in Finance, The University of Texas at Austin (2017 -)
Lecturer in Finance, San Diego State University (2013-2014)
Dean's Executive Professor of Finance, Santa Clara University (2008-2011)
Director and co-Chair, Santa Clara Initiative for Financial Innovation & Risk Management (2009-2011)
Executive Director, Sury Initiative for Global Financial Innovation & Risk Management (now the Center for Analytic Finance), The University of California at Santa Cruz (2008-2011)
Adjunct Professor of Economics, The University of California at Santa Cruz (2008-2009)
Adjunct Professor of Finance, DePaul University (2006-2008)
Graduate Research Assistant, Department of Organizational Behavior, San Jose State University (1992)
Teaching Assistant, Statistical Analysis, The University of California at Santa Cruz (1992)
Teaching Assistant, Macroeconomic Theory, The University of California at Santa Cruz (1991)

TEACHING AWARDS AND HONORS

UT Faculty Honor Roll, McCombs School of Business (2018, 2019)
Outstanding Teaching Award, Texas Spirits Service Organization (2017)
Entrepreneur's Choice Award, Venture Capital Investment Competition (2011)
ACE Outstanding Faculty Award, Santa Clara University (2010)
Leavey School of Business Extraordinary Faculty Award, Santa Clara University (2009)
Seiden Award, DePaul University College of Commerce (2007)
IBM Austin Excellence Award, IBM Austin (Statistical Process Control Instructor) (1988)

COURSES TAUGHT

Graduate (MS / MBA)
Decision Analytics (Finance), The University of Texas at Austin (2020)
Investment Theory, University of Texas at Austin (2019, 2020)
Advanced Corporate Finance, University of Texas at Austin (2019, 2020)
Investments, Santa Clara University (2010, 2011)
Applied Portfolio Management, Santa Clara University (2009, 2010, 2011)
Independent Research Studies—MBA, Santa Clara University (2010)

Undergraduate Level (BA / BS / BBA)
Research Topics in Investment Management, University of Texas at Austin (2019, 2020)
Valuation, University of Texas at Austin – Undergraduate Level (2018, 2019, 2020)
Business Finance, University of Texas at Austin - Undergraduate Level (2017, 2018, 2019)
Corporate Finance, San Diego State University - Undergraduate Level (2013)
Endowment Management, Santa Clara University - Undergraduate Level (2011)
Investments, Santa Clara University - Undergraduate Level (2008, 2009, 2010, 2011)
Applied Portfolio Management, Santa Clara University - Undergraduate Level (2009, 2010, 2011)
Securities Markets, University of California - Undergraduate Level (2008, 2009)
Investments, DePaul University - Undergraduate Level (2006, 2007)

Professional
Applied Macroeconomics, Goldman, Sachs & Co. Analyst Program Instructor (1995, 1996)
Financial Statement Analysis, Goldman, Sachs & Co. Analyst Program Instructor (1995, 1996)
Statistical Process Control, International Business Machines (IBM) Corp., Engineering (1988, 1989)

BOARDS AND COMMITTEES

Member, Analytics Task Force, McCombs School of Business, University of Texas (2019-)
Review Committee, Eastern Finance Association (EFA), (2018-)
Reviewer, Journal of Wealth Management (2017-)
Member, Advisory Board, Opal Wealth Management Conference Series (2012-2014)
Program Committee Member and Referee, Eastern Finance Association (EFA), (2010-2011)
Board of Directors, Santa Clara Initiative for Financial Innovation and Risk Management (2009-2011)
Finance Dept. Representative, Undergraduate Leadership Team (Curriculum Committee), Leavey School of Business, Santa Clara University (2009-2010)
Board of Councilors, Social Sciences Division, University of California at Santa Cruz (2008-2014)
Board of Directors, Sury Institute for Global Finance and International Risk Management (SIGFIRM) at UC Santa Cruz (2008-2013)
Board of Advisors, Santa Cruz Institute for International Economics (2008-2010)
Board of Advisors, School of Management in Silicon Valley Task Force, University of California at Santa Cruz (2008-2009)
Board of Advisors, Arditti Center for Risk Management, DePaul University (2006-2008)
Board of Directors, Medical Research Institute Council (MRIC), Childrens Memorial Hospital (2000-2006)
Steering Committee Member, UN Womens Summit (2014)
Committee Member, San Jose Police Officers Association Major Awards (2008)
Member, Advisory Board, Office of the Sheriff, Santa Clara County (2010-2018)
Board Member, University of Chicago CEO Roundtable (2000-2005)

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Faculty Advisory Positions

Faculty Advisor, Undergraduate Research, University of Texas at Austin (Fall 2018, Spring 2019, 2020)
Interviewer/Admissions Committee, Financial Analyst Program, UT Dept. of Fin. (2019)
Faculty Advisor, Plan II (Honors Undergraduate), University of Texas at Austin (Spring 2019)
Faculty Advisor, Venture Capital Investment Competition, Santa Clara University (2011)
Faculty Advisor, Graduate Research—MBA program, Santa Clara University (2010)
Research Advisor, Graduate Research—Economics PhD program, University of California (2009)
Thesis Advisor, Graduate Research—Int'l Finance MS program, University of California, (2008)

Professional Employment

CEO, Analytic Holdings LP, Beverly Hills, California, (2011-2019)
Chairman, Alpha Fund Management, LLC, Chicago, Illinois (2004-2009)
CEO, Chicago Analytic Trading Co. LLC, Chicago, Illinois, (2000-2009)
Vice President, Goldman Sachs & Co., New York, New York and Chicago, Illinois (1994-2000)
Consultant, Santa Clara County D.A.'s Office, Economic Crimes Unit, San Jose, California (1992-1993)
Consultant, Lockheed Integrated Solutions Company, San Jose, California (1991-1993)
Operational Support Engineer, Lockheed Missiles & Space Co., Austin, Texas (1990)
Manufacturing Engineer, International Business Machines (IBM) Corp., Austin, Texas (1988-1989)
Programmer/Intern, Lockheed Missiles & Space Co., Austin, Texas (1987)
Intern, Microelectronics & Computer Technology Corp. (MCC), Austin, Texas (1986-1987)

Professional Licenses (Previously Held)

General Securities Principal, Series 24, Financial Regulatory Authority (2002)
Registered Investment Adviser, Series 65, North American Securities Administrators Assoc. (2000)
General Securities Registered Representative, Series 7, National Association of Securities Dealers (1995)
National Commodities Futures Examination, Series 3, National Futures Association (1995)
Uniform Securities Agent State Law, Series 63, North American Securities Administrators Assoc. (1995)
Reserve Officer Level III, California Peace Officer Standards & Training (1992)

Professional Awards and Honors (Selected)

#1 US-based Wealth Manager, Wealth Manager Magazine (2007)
Top 10 Financial Advisor (RIA), Financial Advisor Magazine (2006)
#1 US-based Wealth Manager, Bloomberg/Wealth Manager Magazine (2006)
#2 US-based Wealth Manager, Bloomberg Wealth Manager (2005)
40 Under 40: Chicago's Rising Stars, Crains Chicago Business (2003)
Commendation Letter, Santa Clara County District Attorney's Criminal Investigations Division (1992)
IBM Austin Excellence Award, International Business Machines (IBM) (1988)

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SPEECHES & PRESENTATIONS (SELECTED)

"Equity Investment Strategies"
Family Office and Private Wealth Management Summit (2019)

"Minority and Women Owned/Managed Firms: How Diversity & Inclusion Has Produced Higher ROIs"
Emerging Managers Summit (2018)

Keynote Speech - "Risk and Asset Allocation: Best Practices"
Private Wealth Management Summit (2017)

"Investment Outlook for Endowments and Foundations"
19th Annual Endowment & Foundation Forum (2017)

"Rethinking the Yale Model: Multi-Asset and Tactical Allocation for a New Era"
Alternative Investment Summit (2017)

Panelist – Buyout Funds Panel
PartnerConnect Southwest (2017)

"Global Macroeconomic Outlook & Forecast: The State of the Economy"
Family Office & Private Wealth Management Forum (2017)

"Measuring Alpha: Emerging vs. Established Managers (Data & Observations)"
Emerging Managers Summit: Fordham School of Law (2017)

"Private Equity & Impact Investing"
Impact Investing Forum (2017)

"Family Office CIO Roundtable"
Family Office Winter Forum (2017)

"New Alternative Investment Strategies: The Demand for Higher Level of Portfolio Efficiency"
Investment Education Symposium (2017)

"Investing in Private Equity & Venture Capital"
Endowment & Foundation Forum (2016)

"Best Practices in Asset Allocation & Risk Budgeting: A Case Study"
Private Wealth Management Summit (2016)

"Cyber Security: Risks and Solutions"
The Family Office Winter Forum (2016)

"Current Macroeconomic Issues & Impact on Investment Decisions"
12th Annual Investment Education Symposium (2016)

"Jumping the Fence: The Journey from Investment Manager to Private Investor (Family Office)"
The NYC Single Family Office Summit (2016)

"Optimal Portfolio Strategies in the Current Economic Environment"
The Family Office Super Summit (2015)

"Current Economic and Geopolitical Challenges Facing Investors"
DC/East Coast Family Office & Wealth Management Annual Conference (2015)

"Best Practices: Investment Structures & Syndication"
Family Office & Private Wealth Management Forum (2015)

"On the Optimal Integration of Active and Passive Investments"
The Chief Investment Officers' (CIO) Summit (2015)

"Energy Sector Investment Opportunities & Risks"
Royal Bank of Canada Family Office Investment Forum (2015)

"Energy Market Outlook & Strategies"
Family Office Winter Forum (2015)

"How to Monitor & Track Investments"
State of Louisiana/LATEC Investment Education Symposium (2015)

"Risk & Asset Allocation: How to Manage, Measure, and Mitigate Risk"
27th Annual NAPO Police, Fire, EMS, & Muni Employee Pension & Benefits Seminar (2015)

"Why Alternatives: The Investor's Perspective"
Alternative Investment Summit (2014)

"Reinventing Private Equity for the Coming Cycle"
"The End of the Traditional Risk-Return Model for Asset Allocation"
Middle East Family Office Symposium, Dubai (2014)

"Renewable & Traditional Energy: Best Practices and Approaches"
Endowment & Foundation Forum (2014)

"Investing in Alternatives"
Investment Trends Summit (2014)

"The Changing Face of Hedge Funds & Hedge Fund of Funds (FOF)"
Family Office & Private Wealth Forum (2014)

"Why Emerging Managers: An Investor Roundtable"
Emerging Managers Summit (2014)

"Investing in Hedge Funds to Boost Portfolio Returns: Strategies"
European Family Office & Private Wealth Management Forum, Geneva (2014)

"The Family Office & High Net Worth Investor: Structuring Joint Ventures"
Real Estate Investors Summit: Dealmakers Conference (2014)

"Evaluation of the Fixed Income & Credit Markets"
26th Annual Police, Fire, EMS, and Municipal Employees Pension & Benefits Seminar (2014)

"Risk: Asset Allocation & Tail Risk Optimization"
Alternative Investing Summit (2013)

"What Investors Look for in an Emerging Manager"
Emerging Managers Summit South (2013)

"Investing in Oil & Gas: Growing Imbalances in Supply & Demand"
Middle Eastern Family Office Symposium, Dubai (2013)

"Absolute Returns: The Role of Alternative Investments in Portfolios"
Investment Trends Summit (2013)

"Targeting Risk Over Returns: New Models & Approaches"
Family Office & Wealth Management Forum West (2013)

"Opportunities in the Credit Markets"
Endowment & Foundation Forum (2013)

"Distressed Credit: Investment Opportunities & Strategies"
European Alternative Investment, Monaco (2013)

"New Investment Styles & Strategies"
Investment Trends Summit (2012)

"Constructing a Family Office Portfolio"
Family Office & Private Wealth Management Forum (2012)

"Structuring JV Transactions with Family Offices"
Real Estate Investors Conference: Dealmakers Conference (2012)

"Evaluation of Private Equity Exit Strategies"
2012 Private Equity Summit

"Economic Outlook"
NY Investment Consultants Forum (2012)

"Macroeconomic Themes in 2012"
Trust, Tax, & Estate Planning Forum (2012)

"Investment in Sustainable Energy Programs"
Energy Investment Forum (2012)

"Alternative Asset Allocation Models for Institutional Investors: Theory & Practice"
European Alternative & Institutional Investing Summit, Monaco (2012)

"Alternative Investment Styles & Strategies: Economic Issues & Key Opportunities in 2012"
Alternative Investment Summit (2011)

"Overview of the Financial Services Industry: An Inside Perspective"
The University of San Diego (2011)

"Hedge Fund Strategies: Emerging Managers"
Emerging Managers South (2011)

"Due Diligence & Evaluation of Investment Managers"
Family Office & Private Wealth Management Forum West (2011)

"Opportunities in the Credit Markets"
Endowment & Foundation Forum (2011)

"Gold & Precious Metals: A Valuation Perspective"
Real Asset Investing Forum (2011)

"Black Swans: How to Mitigate Exogenous Risk"
5th Annual Private Equity Summit for Institutional Investors (2011)

"Elements of Efficient Portfolio Management: Some Observations"
Investment Trends Summit (2011)

"Investing Abroad—Identifying and Securing Investment Opportunities Outside Europe"
European Family Office and Private Wealth Management Summit, Geneva (2011)

"Sustainable Investing: Solar Power Capital Investments"
Clean & Green Investment Forum (2011)

"Manager Selection & Due Diligence"
Newport Family Office and Private Wealth Summit (2011)

"Current Risks and Opportunities in the RMBS and CMBS Markets"
Real Estate Dealmaker's Summit (2011)

"Emerging, Emerged, Advanced, & Decaying: Where is the Smart Money Going in 2011?"
European Investment Consultant's Forum, London, (2011)

"An Overview of Emerging Manager Programs under the Current Regulatory Regime"
The Emerging Managers Forum (2010)

"Government Taxation & Regulation: What are the Current Changes?"
Trust, Tax, & Estate Planning Forum (2010)

"Benefits & Opportunities Offered by Investing in Emerging Managers"
8th Annual Emerging Managers Summit (2010)

"Non-Agency Trading Roundtable"
Real Estate Investors: The Dealmakers Conference (2010)

"Global Asset Allocation"
2nd Annual European Family Office and Private Wealth Conference, Geneva (2010)

"Hedge Funds vs. Private Equity"
Private Equity Summit for Institutional Investors (2010)

"Opportunities in Hedge Funds & Economic Outlook for Alternative Investments"
Alternative Investing Summit (2010)

"Hedge Funds: Bulletproof Alpha & Performing in All Market Conditions"
European Alternative & Institutional Investing Summit, Monaco (2010)

"Benefits & Opportunities of Investing in Emerging Managers"
Emerging Managers Investment Summit South (2010)

"Hedge Funds vs. Private Equity"
Private Equity Summit for Institutional Investors (2010)

"Hedge Funds & Their Role Today"
Family Office and Private Wealth Management Forum, Newport (2010)

"Global Credit & Fixed Income Markets:
Understanding How Past Implications Affect Future Conditions"
European Family Office and Private Wealth Conference, Geneva (2010)

"Risk & Risk Management"
Emerging Managers Summit (2010)

"FDIC Policies, Auctions & Sales"
Real Estate Investors: The Dealmakers Conference (2010)

"Leadership Perspectives"
The Foundations of Leadership, Santa Clara University (2010)

"Defining, Finding, and Using Alpha"
Alternative Investing Summit (2009)

"Portfolio Construction & Risk Management"
Investment Trends Summit (2009)

"Investment Styles & Strategies"
Endowment & Foundation Forum (2009)

"The Role of Risk in Asset Allocation: Tactical & Strategic"
Family Office & Private Wealth Management Forum (2009)

"Remarks on Systemic Risk in the Financial Markets"
The Arditti Center for Risk Management – Annual Conference (2009)

"Challenges Facing Endowments & Foundations: Past, Present & Future"
10th Annual Endowment & Foundation Forum (2008)

"Providing Best in Class Investments: Matching the Right Product to the Right Client"
Structured Products for the Private Banking Industry (2008)

"Insight into Family Office Investing"
Private Wealth Management Summit (2008)

"Macroeconomic Insights: A Credit Bubble Ready to Burst"
University of California/Center for Global, International & Regional Studies (2008)

"Systematic Risk: Financial Bubbles & Fads"
Circle of Finance Opportunities (2007)

"Designing Prudent Portfolios: Evaluating Investment Managers"
Deutsche Bank Ultra High Net Worth Seminar (2007)

"Systemic Risk in the US Credit & Subprime Markets: A Reckoning to Come"
US Council of Economic Advisors Seminar (2007)

"The Use of Structured Investments to Enhance High Net Worth Portfolios"
4th Annual Structured Products in the Private Banking Industry (2007)

"The Changing Profile of Sophisticated Investors"
Lipper Investor Outlook & Master Classes (2007)

"Implementing Alternative Investments: Single Hedge Funds vs. Fund of Funds"
Reuters AdvicePoint Forum (2007)

"Greek Lessons—Differentiating Between Alpha & Beta"
Hedge Funds World, Bahamas (2007)

"Chairman's Opening Address"
"Integrating Wealth Management & Risk Budgeting"
Private Banking India, Mumbai (2007)

"Risk Budgeting and the True Cost of Active Management Alpha"
Alpha Bets – 2007

"Risk Budgeting and Hedge Fund Replication: Are You Getting What You Paid For?"
Liability Driven Investing (The Harvard Club, NYC) (2007)

"Convergence in the Hedge Fund & Private Equity Arenas"
CFO Private Equity Roundtable, DePaul University (2006)

"Controlling Firm Risks"
CFA Institute / Association for Investment Management & Research (2003)

"Industry Fundamentals—Investment Banking"
University Economics Association (2008)

"Corporation Finance Developments"
The University of California at Santa Cruz (2008)

"Defining Risk"
IQPC Risk Budgeting for Asset Allocation (2006)

"Risk Budgeting in the Pursuit of Alpha"
Alpha Bets (2006)

"The Optimal Integration of Traditional and Alternative Investments"
Alternative Investment Methodologies Summit (2005)

"Macroeconomic Perspectives"
CMG 'Power of Analytics' Conference (2004)
"Investing in the Burgeoning Indian Capital Markets"
The University of Chicago, Graduate School of Business (2004)

"The Entrepreneurial Edge"
The University of Chicago, Graduate School of Business (2004)

"Private Equity in Diversified Portfolios"
The Axial Network Forum (2004)

"Alternative Investments Panel"
CMG Semiannual Economic Conference (2003)

"Efficient Portfolio Management—the Optimal Integration of Traditional & Alternative Investments"
Mayer Family Board / Sedgwick Street Investments (2003)

"Private Equity Perspectives: A Panel Discussion"
CEO Roundtable of the University of Chicago (2003)

"40 Under 40 Spotlight"
Young Executives Club (2003)

"Efficient Portfolio Management and the Power of Networking"
The University of Chicago, Graduate School of Business (2003)

PUBLICATIONS, WORKING PAPERS & BOOK CHAPTERS

Sury, S.M. "Big Banks Don't Fear Big Fines," (Op. Ed.) *Dallas Morning News,* 1/19/2019.

Sury, S.M. "Trump Rails About Trade Deficits with Specific Countries, But They Aren't Actually Bad," (Op. Ed.) *Dallas Morning News,* 6/14/2018.

Sury, S.M., "Modern Portfolio Theory—A Brief Review," in Sury (ed.), *Essential Readings in Applied Financial Economics,"* Cognella, 2010.

Sury, S.M., "A Technical Formulation of Passive Risk Portfolios," in Sury (ed.), *Essential Readings in Applied Financial Economics,"* Cognella, 2010.

Cernauskas, D., S.M. Sury, and A. Tarantino, "Corporate Board Governance Reforms to Improve Risk Management" 2009, (used extensively in Ch.14: Cernauskas and Tarantino, *"Essentials of Risk Management in Finance,"* Wiley). 2012.

Sury, S.M. and M. Sury, "Analytic Due Diligence Using An 'Alpha Cost Index,'" *CACM Working Paper,* 2006.

Sury, S.M., "Efficient Portfolio Management: A Guide to Effective Investment Supervision Processes," *CACM Working Paper,* 2003.

MEDIA APPEARANCES

"How to Identify New Revenue Streams and Success Ventures for Your Business"
Business Insider (2020)

"Congress Needs to Give Americans the Relief They Desperately Need"
Victoria Advocate (2020)

"Coronavirus Relief Negotiations"
KTBC-TV (Fox) (2020)

"Walmart Goes Head to Head with Amazon Prime"
WLS-TV (ABC) (2020)

"Money Moves for Recent Grads"
Nasdaq (2020)

"Feeling Overwhelmed and 'Boxed' in by Your 401(k)? Here's the Way Out"
Forbes (2020)

"Will There Be a Second Coronavirus Stimulus Check?"
Huffington Post (2020)

"Will Fintech 'Save the Day' as USA Struggles with Corona Stimulus?"
Finance Magnates (2020)

"Amazon Prime Has a New Competitor Thanks to Walmart Plus"
KTRK TV – ABC Houston (2020)

"Coronavirus Stimulus Deal Includes Student Loan Relief"
Reform Austin (2020)

"Rackspace: You're Bigger, Quieter, and More Indebted than we Remembered"
San Antonio Express News (2020)

"Your Stimulus Debit Card Has Fees: Here's What You Need to Know"
KXAN TV – NBC Austin (2020)

"Texas Unemployment Rate Hits Worst on Record at 12.8%"
Texas Tribune (2020)

"COVID-19 and Personal Finance
KTBC TV – FOX Austin (2020)

"SXSW Has Few Good Options Amid Coronavirus Threat"
Austin American Statesman (2020)

Debtors Should Be Wary of Keeping Coronavirus Stimulus Money in the Bank, Economist Says"
KXAN TV – NBC Austin (2020)

"Governor Abbott Declares Public Health Disaster, Orders All Texas Schools Closed"
KEYE TV – CBS Austin (2020)

"Austin Job Market Strong Heading into Coronavirus Scare"
Austin American Statesman (2020)

"Austin's Economy in 2020: Expect Solid Growth but Below Boom-Town Pace"
Austin American Statesman (2020)

"Austin's 2019 in Business: More Calm, Some Cooling"
Austin American Statesman (2019)

"Millennials Spending Habits Forcing Shift in the Economy, Pressing Retailers to Adapt"
KEYE TV – CBS Austin (2019)

"Austin Jobless Rate Hits 20-year Low of 2.2%"
Austin American Statesman (2019)

"Austin Jobless Rate Slips to 20-year Low of 2.5%"
Austin American Statesman (2019)

"Austin Jobless Rate Dips to 2.8% for August, a 20-year Low"
Austin American Statesman (2019)

"More Parents are Giving Kids Their Own Credit Card"
KEYE TV – CBS Austin (2019)

"Austin Jobless Rate Slips to 2.7%; Demand for Workers Remain Strong"
Austin American Statesman (2019)

"South Austin Business Owners Brace for 2019 South by Southwest"
Community Impact Newspaper (2019)

"Average Hourly Wage on the Rise in Austin, Dallas Fed Report Says"
Austin American Statesman (2019)

"Northwest Austin Business Owners Vie for Bigger Boost from SXSW"
Community Impact Newspaper (2019)

"Wells Fargo Proves That Big Fines for Big Banks Don't Work"
Austin American Statesman (2019)

"Austin's 2019 Outlook Still Strong, But Could Slip from '18 Pace."
Austin American Statesman (2019)

"Digital Gift Cards May Be Safer, But There are Still Risks"
KEYE TV – CBS Austin (2018)

"The Year of Apple and Amazon: Rewinding Austin's Top Business Stories of 2018"
Wired Focus (2018)

"Wage Growth Booms in Austin"
Austin American Statesman (2018)

"Local Jobless Rate Slips to 3% in Continued Tight Labor Market"
Austin American Statesman (2018)

"Small Businesses Could Take a Hit with Amazon's Minimum Wage Increase"
KVUE TV – ABC Austin (2018)

"Local Businesses Trying to Stay Afloat Amid Water Crisis"
Austin American Statesman (2018)

"Covered Calls are Attractive in a Flat Market"
US News & World Report (2018)

"Shorter Duration Can Protect Your Bonds"
US News & World Report (2018)

"How Will the SCOTUS Decision On Sales Tax Affect Texas?"
ABC/Austin (KVUE) (2018)

"How Investors Can Cope With Market Swings"
US News & World Report (2018)

"Investing With Borrowed Money Can Win Big"
CNBC (2018)

"5 Best and Fast Small Business Loans"
Entrepreneur Magazine (2018)

"Becoming a More Competitive MBA Applicant"
US News & World Report (2018)

"Nearly 40% of Gen Xers Believe They Won't Be Able to Retire"
Texas Standard (2018)

"4 Ways Anyone Can Support Gun Control"
US News & World Report (2018)

"Value Averaging: An Investment Strategy to Avoid"
US News & World Report (2017)

"Navigating the Brave New World of Cybersecurity Investing"
CNBC (2017)

"Is the Treynor Ratio for You and Your Money?"
MSN (2017)

"Borrowing to Invest is Risky Business"
US News & World Report (2017)

"What To Do When Your Index Fund Changes"
US News & World Report (2017)

"Five Ratios Investors Need to Know"
US News & World Report (2017)

"How Beginners Can Buy Individual Stocks"
US News & World Report (2017)

"Entrepreneurs Explain First Things Needed in Starting Business"
CEO Blog Nation (2017)

"New Study Suggests Most Active Investment Managers Not Worth the Fee"
US Financial News Today (2017)

"Target Return Funds an Option for Some Anxious Investors"
US News & World Report (2017)

"Best Careers for Finance Majors"
Best Colleges.com (2016)

"Economical Portfolio Management: A Guide to Successful Investment Supervision Procedures"
Adaptive Design (2016)

Market Folly (2016)
"27 Reasons Why the Smart Money is in NYC"

US News & World Report (2016)
"Will the Flynn Investigation Reverse Trump Era Stock Market Gains"

Forbes (2015)
"US Stock Market Update: Word on the Street"

"A Wake Up Call for US Independent Producers"
Oil & Gas Monitor (2015)

"New Study Shows Oil Investments May Protect Against Bond Declines"
The Trading Pulse (2014)

"New Study Shows Oil Investments May Benefit Bond Investors"
ETF Radar (2014)

"Smart Beta Investing in North America"
Russell Indexes/ClearPath (2014)

"Why Iran Matters a Little Less to Oil Markets"
CBS/MarketWatch (2013)

"Eight Recommendations for Hedge Fund Managers That Utilize MFN Side Letters"
Hedge Fund Law Report (2012)

"New Research Shows Majority of Investment Managers Not Adding Value "
Emerging Manager Focus (2012)

"Emerging Markets Suffer a Setback on China Worries"
CBS/MarketWatch (2012)

"Active Managers May Not Add Value"
Financial Planning Magazine (2012)

"Commodity Markets Look for Hero in China"
CBS/MarketWatch (2012)

"Time Will Tell Worth of Actively Managed ETFs"
Financial Planning Magazine (2012)

"China, India Rock Gold, Oil Commodity Markets"
CBS/MarketWatch (2012)

"Sury Responds to 'Slow & Steady' Investment Strategies"
Investment Weekly News (2012)

"Investment Policy Statements: A Roadmap for Volatile Markets"
Reuters (2011)

"STATESIDE: Wall Street Giant Adapts to Survive"
Fund Strategy (2009)

"Hedge Fund Investors Hire Private Eyes to Avoid New Madoffs"
Bloomberg (2009)

"How Can Hedge Fund Managers Talk to Corporate Insiders Without Violating Applicable Insider Trading Laws?"
Hedge Fund Law Report (2009)

"ECONOMY: Shaping Up"
Fund Strategy (2009)

"Stanford Wants to Unload $1B in Assets at Bargain Prices"
Silicon Valley Business Journal (2009)

"Why Does Capital Raising for Distressed Debt Remain Particularly Challenging?"

Hedge Fund Law Report (2009)
"Professor Sury to Award Top Scholar in Ethical Finance and Risk Management at SIFIRM Conference"
Investment Weekly News (2009)

"Seen & Heard"
I.I./Foundation & Endowment Money Management (2009)

"Bridgewater Tops List of Biggest US Hedge Funds"
Bloomberg (2009)

"A New Santa Clara University Program Attracts Innovative Thinkers to Study Socially Responsible Investing, Business Ethics, and Risk Management"
Santa Clara University MindWorks (2009)

"New Sury Initiative in Silicon Valley to Integrate Ethics, Innovation and Finance"
Investment Weekly News (2009)

"Chicago Adviser Heads Boutique Rankings"
Private Banker International (2007)

"Wealth Manager Top Dog Report"
Bloomberg Wealth Manager (2007)

"US Wealth Advisers: Small is Beautiful in US Wealth"
Private Banker International (2006)

"Bloomberg's Top Wealth Managers"
Bloomberg Wealth Manager (2006)

"Qualities of Best Wealth Managers"
Financial Times/FundFire (2006)

"From Omega to Alpha: A New Ratio Arises"
Reuters/HedgeWorld (2006)

"Private Equity and Hedge Fund Executives Discuss Latest Trends at DePaul Finance Forum"
DePaul University (2006)

"Top Ten RIA Firms"
Financial Advisor Magazine (2005)

"New Risk Philosophy Makes Strides in Wealth Management"
Reuters/HedgeWorld (2006)

"Top Ranked Wealth Managers"
Wealth Manager Magazine (2005)

"Firm Launches 'Fund of Funds' With a Twist"
Crains Chicago Business (2004)

"Controlling Firm Risks"

CFA Institute (2004)

"40 Under 40: Chicago's Top Rising Stars"
Crains Chicago Business (2003)

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