

PROFESSIONAL EXPERIENCE

2009 – June 2014 **Passport Capital**
San Francisco, California

Director, Sales and Marketing

Responsible for marketing all Passport strategies to institutional investors and consultants. Assisted in the development of new strategies and member of Passport's Investment Committee.

2006 -- 2009 **D. E. Shaw & Co.**
San Francisco, California

Director of Institutional Sales

Responsible for marketing hedge funds, long only and 130/30 strategies, and private investments to public fund, corporate, and endowment and foundation prospects in the Western region (Chicago to Hawaii). Also responsible for consultant relationships

1995 -- 2006 **PUTNAM INVESTMENTS**
San Francisco, California

Managing Director, Regional Sales Director – Global Institutional Management

Responsible for public funds, corporate, and endowment and foundation clients and new business relationships in the Midwest and West.

Representative Clients:

- CalPERS, CalSTRS, Los Angeles County, Stanislaus County, Ventura County, East Bay MUD, and the States of New Mexico, Utah, Wyoming, Hawaii, and Nevada
- Ford, Chrysler, Fluor, Toyota, Wellpoint, Delta Dental, American President Lines
- University of California, Ahmanson Foundation, Fletcher Jones Foundation, Guide Dogs for the Blind, Oregon Community Foundation

1988 -- 1995 **DEAN WITTER REYNOLDS, INC.**
San Francisco, California

Managing Director, Public Finance, Manager -- Western Division

Responsible for developing and implementing revenue bond financing solutions for states, counties, cities and public authorities:

- prepared detailed analysis of recommended financing and investment options
- structured financing
- conducted rating agency and investor presentations
- prepared and presented post-sale analysis to senior staff and board members

Accomplishments:

- financed over \$510 million projects annually

- ranked #1 in transportation finance by *Institutional Investor Magazine*
- established 59 new banking relationships with five states, eighteen counties, twelve cities and twenty-four agencies

1984 -- 1988

MORGAN STANLEY & CO. INCORPORATED
New York, New York

Principal

Responsible for developing and implementing transportation finance practice

Accomplishments:

- managed six member team
- ranked #2 in transportation finance by *Institutional Investor Magazine*
- managed over \$3.5 billion of transportation financings

1977 -- 1984

The First Boston Corporation
New York, New York

Vice President -- Manager, Transportation Group

Responsible for developing and implementing transportation finance practice

Accomplishments:

- promoted from Associate VP to VP and Group Manager
- established firm's first transportation finance group
- ranked #5 in transportation finance by *Institutional Investor Magazine*

1974 -- 1977

Federal Government Service
Washington, D.C.

Legislative Assistant to U.S. Senator Robert P. Griffin

Assistant to Vice President Nelson A. Rockefeller

Financial Analyst, United States Treasury Department

EDUCATION

Bernard Baruch Graduate School of Business, MBA, Finance
 New York University, BS, Finance

MILITARY SERVICE

Honorably Discharged
 United States Marine Corps

CIVIC ACTIVITIES

Marin Municipal Water District
 Board Member 1993 -- 1996
 President 1994

Securities Licenses

Series 7
 Series 24
 Series 63
 Series 6
 Series 3

