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Educational Background

Masters of Business Administration, University of Texas at San Antonio, GPA: 3.83 (1991)

Bachelors of Business Administration in Accounting with Highest Honors, University of Texas at Austin, GPA: 3.86 (4.0 in all business courses) (1986)

Bachelors of Music in Music Theory with High Honors, University of Texas at Austin (1985)

Professional Designations

Chartered Financial Analyst (CFA) (1996)

Certified Public Accountant (CPA); Received the Elijah Watts Sells Award for top 135 scores in the country (1988)

Certified Cash Manager (CCM) (1992)

Certified Management Accountant (CMA) (1989)

Fellow - Life Management Institute (FLMI) with Distinction (1989)

Certified Life Underwriter (CLU) (1994)

Work Experience

Current Position:

1997-Current: Finance instructor (part-time, evenings) at **The University of Texas at San Antonio**. Responsible for teaching risk management, life and property & casualty insurance, securities analysis and finance courses for The University.

Prior Positions:

2006-2009: VP of Equity Investments in **USAA's Investment Management Company**. Responsibilities include structuring equity mutual fund and asset allocation products for USAA members, setting asset strategy for over \$40 billion in investment assets, building financial models to forecast, manage and optimize investment and financial risks, developing investment objectives, policies, selecting investment managers, and monitoring the performance of investment portfolios against stated objectives and benchmarks.

1996-2006: AVP of Investment Strategy and Analysis in **USAA's Corporate Finance Department**. Responsibilities include setting asset strategy for over \$18 billion in investment assets, building financial models to forecast, manage and optimize investment and financial risks, developing investment objectives, policies, selecting investment managers, and monitoring the performance of investment portfolios against

stated objectives and benchmarks. Act as the Investment Advisor to \$3.0 billion in various retirement plans.

1995-1996: Investment Analyst at the **USAA Investment Management Company**. Responsibilities included determining appropriate investment strategies for USAA's pension and 401(k) plans, performance measurement for these plans and USAA's venture capital portfolio, and providing investment analysis to USAA's trust clients including security analysis.

1989-1995: Capital Asset Programs Director in **USAA's Capital Management Department**. Responsibilities included 1) establishing financial strength goals for USAA and its Affiliates, 2) setting dividend, capital and profitability plans and standards for USAA's subsidiaries, 3) coordinating corporate-wide cash and treasury management projects and banking relationships seeking opportunities to improve efficiency, security and member service, and 4) providing analysis and models to influence the regulation of the financial services industry. In this position, created a capitalization model for USAA that was used as the basis for distributing over \$1 billion to members over the past few years.

1987-1989: Financial Statement Accountant for the **USAA Life Insurance Company**. Prepared and analyzed the company's statutory and GAAP financial statements

1986-1987: Management Accountant for the **USAA Life Insurance Company**. Performed forecasting, expense management and accounts payable functions for the company.