Bill Raymond, CFA

555 Andover Street
Lawrence, MA 01746
billraymond@alumni.mitedu
978-555-1210

Experienced Portfolio Manager who achieves consistent results and deals well with volatility. Adept at balancing performance, customer satisfaction and bringing in new business. Sought-after writer, convention speaker and regularly quoted analyst in the media. Enthusiastic and aggressive M.I.T. Economics graduate with CFA, looking to make change within field.

Currently Senior Vice President, performing several major positions within organization: Money Market Portfolio Manager, Fixed Income Credit Analyst and Portfolio Manager, Economic Analyst and Marketer. Launched $1 billion fund.

PROFESSIONAL EXPERIENCE

BOSTON INVESTORS, INC. Senior Vice President Boston, MA 1984–Present

Promoted to Senior Vice President in recognition of ongoing performance and dedication. Perform 5 major positions with little/no backup support and minimal supervision for this investment counsel firm.

Money Market Portfolio Manager 1986–Present

- Manage all aspects of retail and institutional Money Market Portfolios with assets of nearly $1 billion.
- Developed and launched institutional 2a–7 fund which grew to $1 billion in 3 years.
- Created proprietary systems and models resulting in consistent 2nd quartile gross performance, despite wild volatility of assets in extremely tough market.
- Analyze markets to determine best areas in which to invest.
- Evaluate buy/sell ideas and execute trades to maximize fund.
- Ensure portfolios continuously comply with SEC and IRS regulations and internal guidelines.
- Complete credit research for all corporate credits used in portfolios.

Fixed Income Credit Analyst and Portfolio Manager 1987–Present

- Successfully evaluate and determine creditworthiness of companies in the financial sector.
- Rigorously find and analyze published data about companies.
- Seek out and interact with information providers.
- Attend several annual conferences with key company and industry presentations.
- Make buy/sell recommendations for fixed income portfolios.

Mortgage Backed Securities Analyst and Portfolio Manager 1987–1998

- Determine value within the mortgage-backed and asset-backed markets.
- Make buy/sell recommendations for fixed income portfolios and execute trades.

Economic Analyst 1984–Present

- Solely responsible within company to analyze and report on economic trends and events.
- Write 1–2 four page Boston Investors Staff Letters per year, for extensive distribution to over 750 clients and news media. Letter has been largest source of new clients.
- Write and produce comprehensive quarterly 20 page publication: Economic Outlook, complete with commentary, graphs and economics trends that is distributed to clients and staff.
- Give interactive multi-media presentations at staff and client meetings.
- Report, track and analyze political developments and potential impact on markets for internal staff
- Quoted by numerous newspapers and wire services as an expert on market response to political changes, economic indicators and market movements.

Marketing **1986–Present**

- Create original fixed income marketing materials for marketing department to use with clients.
- Compose written explanations of performance and process for several critical marketing materials per quarter.
- Provide perspective, data and other information during business presentations to potential clients.
- Presented speeches at major industry conferences such as IBC and Fabozzi to build brand awareness. Recent topics:
  - "Creating and Maintaining an Effective Credit Research Process"
  - "Building Blocks of Money Market Securities"
  - "Creating and Maintaining an Effective Credit Research Process"
  - "Government Securities"
  - "Anomalies in the Short-Term Markets"
- Requested by Columbia Business Professor to address Business School Classes on financial topics.

Money Market Portfolio Manager **1985–1987**

- Execute buy and sell orders for firm's individual and institutional clients.
- Obtained best execution of orders with minimal market impact.
- Trade settlement and resolution of disputes.

EDUCATION, CERTIFICATIONS & MEMBERSHIPS

EDUCATION: MASSACHUSETTS INSTITUTE OF TECHNOLGY, Cambridge, MA
A.B. in Economics, 1982

CERTIFICATIONS: Chartered Financial Analyst (CFA), 1989

MEMBER: Bond Analysts Society of Boston
Boston Security Analysts Society

COMMUNITY ORGANIZATIONS

THE CHILDREN'S MUSEUM OF LOWELL **Lowell, MA** **2001–Present**

Vice President, Board of Directors and Chairman, Capital Campaign Committee

Recruited to join and lead effort to create area non-profit museum due to experience in fund raising and organizational development. Museum targeted to open Fall 2003 in a historic mill building that also serves as the headquarters for the Lowell National Historical Park. Capital Campaign goal: $2 million.

THE FRIENDS OF M.I.T. RUGBY **Cambridge, MA** **1987–Present**

Chairman (1997–Present), Vice Chairman (1993–1997), Treasurer (1987–1993)

One of 8 co-founders of an organization that provides financial and logistical support for the M.I.T. Rugby Club. As Chairman, revamped board to improve productivity and results. Raised over $250,000 as endowment to ensure future of organization.

M.I.T. RUGBY CLUB **Cambridge, MA** **1987–Present**

Assistant Coach (1983–1984, 1991–1993)

Served as part-time assistant coach on teams that won one National Championship, appeared in 2 "Final 4's," and reached the "Final 16" once.