

## ACADEMIC POSITIONS

**The University of Texas at Austin, McCombs School of Business** Austin, TX  
Lecturer, Department of Finance *2007- Present*  
*Overall Instructor Rating Average of 4.86 out of 5.0 (based on course instructor surveys)*

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## EDUCATION

**University of Texas Health Science Center, School of Public Health** Houston, TX  
Ph.D. – Health Care Management and Economics August 2020

**University of Texas at Austin, McCombs School of Business** Austin, TX  
Master of Business Administration - Finance *May 2007*

**University of Texas at Austin** Austin, TX  
Bachelor of Arts – Economics *May 2000*  
Bachelor of Business Administration – International Business *August 2000*

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## NON-ACADEMIC POSITIONS

**Great Hills Capital Partners, LLC (Quantitative Hedge Fund)** Austin, TX  
Managing Director *2007-2016*

- Responsible for all management and trading decisions
- Developed quantitative multi-factor algorithms which evaluate and select investment securities
- Manage interactions with fund investors

**Miller Chaffin, LLC** Beaumont, TX  
Portfolio Analyst *2003-2005*

- Developed a momentum model to help forecast price movement trends among asset class indexes based on varying capitalization size, to be used as a tool in portfolio construction
- Analyzed client portfolios to determine match with model portfolio in areas of asset allocation, risk profile and proper portfolio diversification
- Assisted in model portfolio development using mathematical optimization to measure asset correlations and volatility within the portfolios

**Accenture (formerly Andersen Consulting)** Houston, TX  
Consultant *2000-2003*

- Analyzed market structures of deregulated US electric markets and their effects on market participants, producing a white paper which was used throughout Accenture
- Researched and compared a variety of methodologies for developing risk modeling techniques resulting in recommendations to upper management of both Accenture and their clients
- Conducted detailed research interviews with key client personnel to gain information for the development of pricing and power scheduling models
- Worked with a small team of executives to help design a retail natural gas and electricity company. Responsible for recommendations on the design of trading and risk management systems and activities in the proposed company
- Managed a team of analysts

## **PUBLICATION IN REFEREED JOURNALS**

“A Consumer-based Evaluation of Healthcare Price and Quality Transparency” (with Revere, Ratanatawan, Donderici and Morgan), *Journal of Health Care Finance* – Summer 2016

## **TEACHING EXPERIENCE**

McCombs School of Business

**FIN 357 - Business Finance** – Core Course for All Business Majors

Fall 2008, Spring 2009, Fall 2009, Fall 2010, Spring 2011, Fall 2011, Fall 2012, Spring 2013, Fall 2015, Spring 2016, Fall 2016, Spring 2017, Summer 2017, Fall 2017, Spring 2018, Fall 2018, Spring 2019, Fall 2019, Spring 2020, Fall 2020

**FIN 367 – Investment Management** – Required Course for Finance and Accounting Majors

Spring 2010, Spring 2011, Fall 2011, Spring 2012, Fall 2012, Fall 2013, Fall 2014, Summer 2015

**FIN 366P – Finance Practicum** - Course in Financial Analyst Program

Fall 2007, Fall 2008, Fall 2009

**FIN 370 – Integrative Finance** – Capstone Course Required for Finance Majors

Fall 2009, Spring 2010, Spring 2011, Fall 2011, Spring 2012, Fall 2012, Spring 2013, Spring 2014, Spring 2015

**FIN 370 – Directed Independent Research** – Course for Finance Majors

Spring 2012, Summer 2012, Fall 2012

**FIN 397.1 – Investment Theory and Practice** – Required Course for Finance MPA Program

Summer 2010

**Plan II Honors Program Research Supervisor** – Oversee Undergraduate Senior Thesis Research

Spring and Fall 2017, Fall 2019, Spring 2020, Fall 2020

**Plan II Honor Program Thesis Research 2<sup>nd</sup> Reader** - Oversee Undergraduate Senior Thesis Research

Spring and Fall 2010, Spring and Fall 2012, Spring and Fall 2013, Spring and Fall 2015, Spring and Fall 2016, Spring and Fall 2018, Spring and Fall 2019, Fall 2020

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## **TEACHING AWARDS**

**Faculty Honor Role for Excellence in Teaching** – Based on Student Selection Process

Spring 2010, Fall 2010, Spring 2011, Fall 2011, Fall 2012, Spring 2013, Fall 2013, Fall 2014, Spring 2015, Spring 2016, Fall 2016, Spring 2017, Spring 2018, Fall 2018, Spring 2020

**Eyes of Texas Excellence Award** - 2013

**Best Professor Award – Asian Business Students Association** - 2013

**Special Distinction Award – Alpha Kappa Psi** – 2012

**Best Professor Award – Alpha Kappa Psi** – 2011

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## **OUTSIDE SPEAKING**

Presented “The Truth About Quantitative Easing” to Texas Association of County Investment Officers (June 2011, Dallas)

Presented “The Deleveraging of America” to Texas Association of County Investment Officers (June 2010, Corpus Christi)

Presented “The Leveraging of America” to Texas Association of County Investment Officers (June 2009, Kerrville)

## **SERVICE**

Faculty Advisor University Investors Association (Fall 2010 – Present)

Faculty Advisor for Alpha Kappa Psi, Coed Business Fraternity (Fall 2010 – Present)

Finance 357 Oversight Committee (2017- Present)

Selection Committee Member for Financial Analyst Program (Fall 2008 - 2016)

“Algorithms and Investment Strategy” for University Investors Association (April 2019)

“Introduction to Finance” Presentation for DYNAMIC Summer Accounting Program – Minority Recruitment (June, 2019)

“Introduction to Finance” Presentation for DYNAMIC Summer Accounting Program – Minority Recruitment (June, 2018)

“Introduction to Finance” Presentation for DYNAMIC Summer Accounting Program – Minority Recruitment (June, 2017)

Presented “Finance and Your Future” to Delta Sigma Pi Business Fraternity (April, 2017)

Presented “Careers in Finance” to Freshman Interest Group (March, 2017)

Presentation for McCombs Future Executive Academy - Minority Recruitment Program (June, 2015)

Presentation for McCombs Future Executive Academy - Minority Recruitment Program (June, 2014)

Presentation for DYNAMIC Summer Accounting Program – Minority Recruitment (June, 2016)

Presentation for DYNAMIC Summer Accounting Program – Minority Recruitment (June, 2015)

Presentation for DYNAMIC Summer Accounting Program – Minority Recruitment (June, 2014)

Presented “Investment Strategies” to University Investment Association (Nov., 2014)

Presented “The Exciting World of Finance” to Asian Business Students Association (Oct., 2014)

Presentation for McCombs Future Executive Academy - Minority Recruitment Program (June, 2013)

Presentation for DYNAMIC Summer Accounting Program – High School Recruitment (June, 2013)

Panel Speaker for Target Your Future through Career Services (March 2013)

Delivered Financial Workshop Presentation for the Asian Business Students Association (March 2013)

Presented “Update on the Economy” to University Investment Association (Nov., 2012)

Presented “Thoughts on the Market” to University Finance Association (Nov., 2012)

Moderated Careers and Internships Panel Discussion for Hispanic Business Students Association (Oct, 2012)

Presentation for McCombs Future Executive Academy - Minority Recruitment Program (June, 2012)

Presentation for DYNAMIC Summer Accounting Program – High School Recruitment (June, 2012)

Presented Key Note Speech at McCombs Honors Convocation (April, 2012)

Moderated Panel Discussion at Texas Investment Conference (April, 2012)

Presented “Ethical Decision Making” to Delta Sigma Pi (April, 2012)

Presented “A View of the Financial World” to Asian Business Students Association (April, 2012)

Presented “Current Issues in the Market” to University Investment Association (April., 2012)

Presented “Your Money and Retirement Planning” to Black Business Students Association (Feb. 2012)

Judged University Investor’s Association Stock Pitch Competition (Nov., 2011)

Presented “The Power of Saving” to Alpha Kappa Psi (October, 2011)

Presentation for McCombs Future Executive Academy - Minority Recruitment Program (June 2011)

Presentation for DYNAMIC Summer Accounting Program – High School Recruitment (June 2011)

Presented “Hedge Funds and Alternative Investments” to Alpha Kappa Psi (March, 2011)

Presented “Update on the Economy” to University Investment Association (Feb., 2011)

Presented “The Economy Today” to University Investment Association (Oct, 2010)

Presentation for McCombs Future Executive Academy - Minority Recruitment Program (June, 2010)

Presented “A View of Finance” to Association of Latino Professional in Finance & Accounting (April, 2010)

Presented “Hedge Funds and Alternative Investments” to Alpha Kappa Psi (March, 2010)