

# Shirley R. Owen

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## CHIEF INVESTMENT OFFICER ~ SENIOR FUND MANAGER

**Long history of accomplishment in world-class organizations building savvy investment teams and delivering superb investment performance founded on robust analytics and risk control, unequivocal accountability, clear transparency, and exceptional oversight.**

### Key Strengths:

- |  |  |                                    |
|--|--|------------------------------------|
| - Institutional Investment Management            | - Innovative Funding Alternatives      | - Diversified Portfolio Strategies |
| - Governance/Fiduciary Duty of Care              | - Corporate & Capital Market Analytics | - Emerging Markets & Economies     |
| - Fund, Liquidity & Counterparty Risk Management | - Cross-disciplinary Communications    | - Fund Communication Strategy      |
| - Investment Team Building & Leadership          | - Portfolio Management Technology      | - Market & Business Strategies     |
|  | - Board Reporting & Liaison            | - Public Presentations & Speaking  |

Offering more than 20 years of investment management and executive performance within a global institutional framework, illustrating extensive understanding of the capital markets, intensive application of the most robust portfolio management technology, and innovative strategies for credit, emerging markets, and global platforms. Strengthened and improved institutional integrity of strategies through rigorous analytics, prudent risk management, and intrinsic business sense. Unique history investing across the capital structure and development of exceptional co-investment relationships.

Accomplished change agent successful in transforming an underperforming, single-strategy bond department to recognition among the top worldwide, lauded for sophisticated, well-diversified, and highly successful investment managers skilled across multiple asset classes and risk categories. Talent for building cooperation with professionals at all levels and disciplines—including governing boards, audit and operations staff, IT, and investment teams—to spearhead forward-thinking strategies and build institution-level investment platforms to support them.

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## PROFESSIONAL HIGHLIGHTS

### XXXXXXXXXXNAME OF COMPANYXXXXXXXXXX

*Independent corporation managing the largest single-profession pension plan in the U.S. with more than \$XXX billion in assets; invests the pension fund's assets and administers the pensions of XXX,XXX+ active and retired professionals.*

**Senior Vice-President, Fixed Income (FI) and Tactical Asset Allocation (TAA)** – Oct 2007 to Aug 2008

**Senior Vice-President, FI** – Oct 2004 to Oct 2007

**Vice-President, FI** – Sept 2000 to Oct 2004

**Manager, FI** – Jan 1999 to Sept 2000

**Portfolio Manager** – Nov 1998 to Jan 1999

Initially hired to run an internal hedge fund portfolio then quickly promoted to take over management of Fixed Income (FI) department that had been losing money, a problem heightened by deficiencies in tracking exposure.

Immediately raised the bar and transformed the business into one of the most sophisticated and successful institutional FI portfolios globally.

In 2007, assumed added responsibility for Tactical Asset Allocation (TAA) department and within the year led marked improvements in transparency and risk information applied robustly to diverse set of alpha strategies.

Developed and headed team noted for being extraordinarily innovative and savvy investors. Managed 70+ professionals spanning 2 departments and held broad oversight responsibility for delivery of asset class performance and development of risk and portfolio strategies on \$40 billion total assets.

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### Value-Add Snapshot:

Turned around an underperforming, single-risk-strategy department to recognition as one of the most innovative and sophisticated in the world supporting a diversified set of investment platforms. Proliferated culture of informative risk disclosure and transparency fund-wide.

Set the benchmark for performance; met or exceeded targets for 8 consecutive years, driving information ratio of portfolio performance over a government bond index to 3.6 on a 4-year monthly return time series.

Performed at industry competitive levels for past 2 years, leaving virtually no risk of default in securities held as result of current credit market volatility.

Left legacy of world-class systems and introduced investment platforms that broadened and supported expertise of other risk classes and operating groups firm-wide.

Dear Professional, Executive, or Aspiring Executive:

100kCareerMarketing.com is the culmination of nearly 20 years of successful experience. During this time, I have been privileged to work with thousands of executives, professionals, and leaders all across the U.S. and worldwide in developing their resumes and other career marketing documents.

I formed 100kCareerMarketing.com because of my ongoing dedication and commitment to delivering unparalleled service and quality to my clients. As demand for my services as an executive resume writer and career marketing strategist grew to far exceed the time available, a new model for delivery of my services to you was essential. 100kCareerMarketing.com was born of that need and it provides me with a way to deliver dedicated, personal attention to a *very select number of clients* - no more than 20 clients per year (approximately one person every 2 weeks).



Today, 100kCareerMarketing.com is the ONLY way to work with me one-on-one.

That's right. Because it takes time, collaboration, and intense attention to quality and detail to create truly compelling, powerful, results-generating executive career marketing portfolios, I make certain that I give you – and you exclusively – all of the time and attention you need.

I work with a VERY SELECT base of no more than 20 clients per year. When you hire me you benefit from not only my preeminent experience and expertise but from my exclusive, personal attention focused *only* on you and the creation of your career marketing portfolio. I would be honored to work with you. But my schedule fills up *very* quickly, so if you are ready, please reserve your spot today. Of course, if you have any questions, I will be happy to answer them. Just send a quick email or give my office a call.

I also invite you to book a personal 45-minute consultation with me, to go over your resume and job search concerns one-on-one, discuss the strategies I would use in writing your resume, answer your questions, and benefit from my recommendations. Although I charge for the consultation, you have nothing to lose! If you book a consultation and then decide to proceed with my services I will give you a full \$300.00 discount on my VIP executive services.

<https://vip-intro-consultation.youcanbook.me/>

I look forward to meeting with you and hope we have the chance to work together.

Sincerely,

*- Michelle*

This is one of the many career marketing documents that are included (along with an executive résumé) in the portfolios I create for my clients. Please note that although this document has been carefully edited to preserve the anonymity of my client, this example was created for a real client. The strategies used in the document were devised specifically for this client, to address unique aspects of this individual's professional history. While the document is protected by United States Copyright law and copying of any or all of the document is strictly forbidden, doing so would not be in your best interest for other reasons. The best and most effective career marketing documents promote your authentic personal brand and unique value proposition, and the content, design, structure, and formatting strategies are derived from these. It will be my honor to work with you to create YOUR executive career marketing portfolio.

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**Leadership Scope Summary:**

FI department: 35 reports (built from 7 at time of initial promotion); oversight of primary bond asset class representing \$6 billion (long \$21 billion in bonds; short \$15 billion from the floating legs of index derivatives sourced across the fund), including all bond and money market assets, absolute return strategies, as well as cash, and real-rate bonds of \$15 billion.

TAA department: 37 reports; oversight of equity derivatives, commodities, insurance products, global opportunity absolute return strategies, and foreign exchange hedging and overlays representing \$19 billion.

**Selected Contributions:**

- ▶ Established culture of transparency, rigorous risk management, and scrupulous attention to standards of care, ultimately transforming original single-strategy portfolio approach into diversified set of well-structured, focused strategies in liquid global yield curves and highly successful credit investment processes, including 3-tiered emerging market portfolios.
- ▶ Spearheaded development of best practices risk tracking and investment support technology, enabling world-class quantitative analytics. Became valued resource for entire Fund, providing yield curve analytics for operating groups and default risk assessment tools to risk management while setting the standard for integrating analytics information into IT.
- ▶ Led the charge on a number of broad fund management objectives including:
  - new liquidity risk system adopted as a key fund process that established minimum liquidity objectives
  - new margining system for derivative counterparties that required extensive cross-operational cooperation to implement best-in-class processes for mitigating counterparty risks
  - new integrated portfolio reporting system that became the Fund's standard
  - new financial support facility for wholly owned real estate subsidiaries that saved \$12 million per year, was recognized as a nationwide industry first, and was noted as best-in-class throughout the U.S.
- ▶ Created an array of highly innovative strategies, each with institutionally compliant platforms, including fully financed alpha strategies, limited and no-recourse alpha strategies, and arbitrage trading in liquid yield curves and across tranches in credit default swap indexes, all producing strong performance on a risk-adjusted basis while enhancing diversification.
- ▶ Took lead role in developing and executing emerging market strategies direct and through co-investment partnerships with world-class external managers. Resulting innovative strategies included:
  - pan-African equity and mezzanine portfolio that generated outstanding performance
  - consumer finance vehicles in Mexico and Argentinean trade finance with no country risk
  - seeding of manager for project finance of developing economy that became the largest syndication partner of the XXXXXXXXXXXX.
- ▶ Contributed as member of the fund's 2 investment division oversight committees—Investment Planning Committee and Investment Administration Committee. Teamed in leadership-level meetings to set overall long-term Fund objectives; delivered regular presentations to the Board for annual reviews and to full staff at town-halls on fund objectives.

**XXXXCOMPANY NAMEXXXX****Vice-President, Fixed Income (FI) Arbitrage Trading – 1995 to 1998**

Recruited as member of newly developed arbitrage trading team and charged with development of arbitrage trading portfolio within the FI department of the Xxxxx branch of this global investment bank. Applied analytic expertise to set up trading, risk, and reporting spreadsheets for the group. Served as primary trader on the arbitrage desk.

**Selected Contributions:**

- ▶ Devised highly detailed yield curve construction and scenario analysis tools that served as the platform for arbitrage trading strategies between government money market and interbank forward curves as well as exchange traded futures and foreign exchange markets.
- ▶ Avoided exogenous risk through rigorous analytics that withstood extensive auditing and extreme market volatility while allowing team to employ comprehensive arbitrage techniques.

**Value-Add Snapshot:**

Credited for delivering in 1996, 93+% of total revenue within the Fixed Income department, working with partner to contribute \$14 million of the total \$15 million in profit from the sales and trading group.

Produced more than 50% return on regulatory capital for 2 full years of trading in arbitrage strategies.

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**XXXXXCOMPANY NAMEXXXXXX****Vice-President and Manager, FI Exchange Traded Derivatives** – 1993 to 1995**Fixed Income Trader** – 1993**Exchange Traded Derivatives Sales** – 1990 to 1993**Analyst** – 1989 to 1990

Hired originally by Xxxxxxxx (notorious for exceptional analytical rigor) and promoted quickly based on proven success adding value repeatedly through robust analytics and applications to new products, and delivery of new, profitable relationships to the firm.

Ultimately charged with leadership of the Fixed Income Exchange Traded Derivatives department. Led team in marketing and execution of exchange-traded derivatives for institutional derivatives clients and in ancillary market-making and trading functions. Marketed the latest developments in sophisticated portfolios for demanding clients requiring thorough due diligence as part of fiduciary duty.

**Selected Contributions:**

- ▶ Retained in 1994 acquisition of Xxxxx and resulting merger with Xxxxx, and over the next year pulled together disparate groups in Xxxxx and Xxxxx into a high-performance, 17-person team.
- ▶ Developed a solid, diversified, enduring business model that grew revenue 380% from \$1.5 million in 1993 to \$7.2 million while increasing profits in same timeframe from break-even to \$2 million annually.
- ▶ Built team into the “go-to” group for demanding institutional clients requiring the highest levels of care and due diligence, and the most innovative ideas for enhancing investment strategies through derivatives.

**Value-Add Snapshot:**

Merged 2 disparate groups ranking 5<sup>th</sup> for market volume and 9<sup>th</sup> on the Xxxxxxx (initial merged ranking of 5<sup>th</sup>), leading transformation to the leading firm (ranked 2<sup>nd</sup> largest) in the industry in terms of revenues, profits, innovation in products and application, and client execution.

**XXXXXCOMPANY NAMEXXXXXX****Risk Management Consultant** – 1988 to 1989

Member of consulting team serving the largest customers of the Xxxxxxx arm of the #2 global insurance broker. Consulted to client corporations on risk management functions. Forecasted risk exposure at multiple confidence and loss levels and provided robust analytics and feasibility studies for alternative risk management programs. Devised an innovative zero-balance cash flow model used on several projects to define initial investment requirements for predictable cash flows.

\*\*\* Began career after MBA (1987 to 1988) cold-call selling Real Estate Limited Partnerships and retail investor tax shelters for the XXXXCompany NameXXXX.

**EDUCATION & CREDENTIALS**

University of Xxxxxx – Xxxxx, XX

**M.B.A., Finance (1987)**

University of Xxxxxxxx – Xxxxxxx, XX

**B.A., Economics (1984)**

- ▶ Institute of Corporate Directors: Xxxxxxxx, 2005
- ▶ Xxxxxxx Securities Institute: Partners, Directors, and Senior Officers, 1997 – Xxxxxx Options Course, 1991 – Xxxxxx Futures Course, 1990 – Xxxxxxx Securities Course, 1987
- ▶ Accomplished speaker and presenter; made numerous keynote and industry sector presentations.