

## ZACHARY ROLLINS

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### EDUCATION

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**THE UNIVERSITY OF TEXAS AT AUSTIN, McCombs School of Business, Austin, TX** **May 2013**

**Master of Business Administration, Full-Time Program**

- Concentration in Investment Management; GPA 3.84; GMAT score: 720
- Member of Graduate Finance Association
- Serving as Teaching Assistant for Portfolio Management courses in the McCombs BBA Financial Analyst Program

**MIAMI UNIVERSITY, Farmer School of Business, Oxford, OH** **May 2008**

**Bachelor of Science in Finance**

- Oxford Scholars Program; Deans List (3 Semesters)

### EXPERIENCE

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**MBA INVESTMENT FUND LLC, Austin, TX** **2011-Present**

*Fund consists of value, growth, and endowment portfolios. Student portfolio managers are assigned a sector coverage team and prepare stock pitches delivered to professional advisors.*

- One of fifteen students selected by faculty advisors to actively manage the MBA Investment Fund - \$17 million AUM
- Recommended NDAQ, OCN, JEF, and AIG. Selections added 70 basis points of positive attribution to the portfolio
- Built valuation models of selected companies using discounted cash flows techniques and industry appropriate trading multiples

**HERSH FAMILY INVESTMENTS, Dallas, TX** **2012**

*Value oriented, open sector fund investing under NLM Capital Partners, LLC and run out of the Hersh Family Office.*

**Summer Associate**

- Researched the shipping industry and prepared a report that the portfolio manager used in a decision not to purchase additional ships or related securities for the portfolio
- Conducted fundamental research on companies across several sectors in both public and private markets
- Analyzed JCP's turnaround strategy to determine if internally generated cash flows could meet the company's investment needs resulting in the portfolio manager liquidating the position
- Participated in conference calls and in person meetings with firm management and other investors to conduct due diligence for investment opportunities

**FIDELITY INVESTMENTS, Covington, KY** **2008 - 2011**

**Retirement Solutions Representative (2009 – 2011)**

- Prepared investment allocation recommendations for clients with assets up to \$100K based on client needs
- Sold Fidelity personal investing products, finishing in top 10% of sales representatives for 2011 Q1 sales campaign
- Coached and mentored two of four new team members to develop sales language and process

**Financial Representative (2008 - 2009)**

- Facilitated service and trading functions to Fidelity's retail clients in brokerage, IRA, and 529 accounts
- Designed and presented weekly market update for services trading team covering current market activity

**JPMORGAN CHASE, Columbus, OH** **2007**

**Finance and Risk Intern**

- Completed real estate consolidation project resulting in annual cost savings of \$255k for business group

### ADDITIONAL

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- Level III CFA Candidate, Series 7 & 66, Bloomberg Certified
- MBA Soccer Club, Crossfit; Study abroad Differdang, Luxembourg, Spring Semester 2006
- Manages personal investment portfolio utilizing a combination of individual stocks, ETFs, and Mutual Funds

## GE SUN

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### EDUCATION

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THE UNIVERSITY OF TEXAS AT AUSTIN, McCombs School of Business, Austin, TX May 2013

Master of Business Administration, Full-Time Program

- Concentration in Finance; CFA Level III Candidate; GMAT: 720; GPA: 3.8
- Member: Graduate Finance Association, Energy Finance Group, Graduate Consulting Group, MBA Soccer Club
- Champion - 22<sup>nd</sup> Annual Deloitte Consulting Challenge at McCombs

CLEMSON UNIVERSITY, Clemson, SC May 2003

Master of City and Regional Planning

- Graduate Assistant; GPA: 3.9

HEFEI UNIVERSITY OF TECHNOLOGY, Hefei, China July 1998

Bachelor of Architecture

### EXPERIENCE

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EMPLOYEES RETIREMENT SYSTEM OF TEXAS, Austin, TX Summer 2012

Investments Intern

- Developed top-down country analysis for Indonesia equity market and pitched stocks in industrials and materials sectors to portfolio managers and equity analysts
- Identified economic moats for companies in European markets and discovered new investment opportunities
- Researched forensic accounting methods and created earnings quality screen for analysts' use
- Back-tested quantitative models with different valuation and quality metrics to determine the effective fundamental factors in selecting stocks in US equity space
- Analyzed country and sector correlations for emerging markets with data sources from both Bloomberg and FactSet to help portfolio managers make asset allocation decisions

MBA INVESTMENT FUND, LLC, Austin, TX 2011 - 2013

Fund Manager/Performance Manager

- One of 14 student fund managers actively managing Growth Fund and Value Fund with total AUM of \$14M
- Conduct fundamental equity research in Energy, Materials and Industrials sectors, build valuation models, and present investment recommendations to industry advisors
- Generate weekly performance attribution report and present overall fund performance at advisory meetings

SLA STUDIO LAND, Houston, TX 2003 - 2011

Project Manager/Urban Planner

- Developed marketing materials for investment opportunities and presented to Chinese investors, resulting in creation of joint venture with offices in Shanghai and Hangzhou and yearly revenue over \$5M
- Coordinated with clients, local jurisdictional planning department, and engineers on 2,800-acre sustainable master plan project in northeast Houston at conceptual planning stage; successfully transitioned plan to marketing stage
- Fostered planning methodology by using cross-platform software to perform cost estimates, reducing labor hours by 80%

P+H INTERNATIONAL ARCHITECTURAL DESIGN CO., LTD., Shanghai, China 2000 - 2001

Architectural Associate

- Led design for high-end residential development in Shenzhen, China, winning employee achievement award for creativity and client satisfaction

SHANGHAI ZHIXIN GROUP, Shanghai, China 1998 - 2000

Project Manager

- Supervised 4-person team to produce computer renderings, aiding clients in winning various bidding competitions

### ADDITIONAL

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- Language: Fluent in Mandarin Chinese
- Proficient in Bloomberg, FactSet and CapitalIQ
- Work Eligibility: Eligible to work in the US and China with no restrictions

## YIFAN ZHANG

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### EDUCATION

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**THE UNIVERSITY OF TEXAS AT AUSTIN, McCombs School of Business, Austin, TX** **May 2013**

**Master of Business Administration**, Full-Time Program

- Concentration in Finance & Investment Management; GPA 3.6
- StratCap Macro Hedge Fund: one of five students formally selected to assist in early development of macro hedge fund

**THE CITY UNIVERSITY OF NEW YORK, Queens College, Flushing, NY** **June 2004**

**Bachelor of Science in Computer Science**

- Graduated with honors: Dean's List, University Student Senate Academic Scholarship recipient; GPA 3.7

### EXPERIENCE

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**Liberty Park Capital, Austin, TX** **Summer 2012 - Present**

*Fundamentally-driven small cap long/short equity hedge fund focusing on technology and industrial sectors*

**Research Analyst**

- Cover 9 semiconductor and electronic components companies by maintaining financial models and post-earning analysis
- Performed an in-depth analysis of the semiconductor automated test equipment (ATE) industry, providing an industry overview, company-specific fundamental analysis, and long and short recommendations for the portfolio manager

**MBA INVESTMENT FUND, LLC, Austin, TX** **2011 - 2013**

*First legally constituted, private investment fund overseeing \$17M assets and managed by students*

**Portfolio Manager**

- One of fifteen students selected to actively manage equity value and growth portfolios
- Developed investment theses through fundamental research including DCF, public, and private market comparable valuations, management and industry expert interviews, analysis of public filings and conference call transcripts; recommended purchase of WDC resulted 17% return
- Published weekly economic update, maintained economic forecasts, and reviewed sector allocation for Growth Portfolio

**Empiric Advisors, Austin, TX** **Summer 2012**

*Quantitative equity investment company managing assets for high net worth individuals and as sub adviser to a mutual fund*

**Summer Quantitative Equity Analyst**

- Developed, backtested, and optimized long equity strategies through implementations of multi-factor models including valuation, momentum, and analyst expectation
- Independently researched and implemented an automated process to maximize portfolio geometric mean return

**SWISS RE, New York, NY** **2007 - 2011**

**Fixed Income Desk Support – Associate Vice President**

- Performed credit portfolio model creation and maintenance, new financial product customization, CDO and CDS model integration and legacy system trades migration; in-house solutions saved \$2M in external consulting fees
- Managed team of four developers to work with risk managers to create a fixed income product profit and loss (P&L) reconciliation system; reduced the number of security positions with unexplained P&L by 95%
- Partnered with central investment office to design and create performance attribution reports for over \$300B fixed-income assets; used to better understand performance/risk attribution of each external asset manager

**DOAR LITIGATION CONSULTING, Inference Data, Lynbrook, NY** **2006 - 2007**

*Data mining service startup under an established litigation consulting business*

**Developer – Associate**

- Led an international team of five software developers to build flagship web based legal document forensic system; saved more than 60% of litigation consulting fees for each user and attracted \$10M investment

### ADDITIONAL

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- **Certifications:** CFA Level II Candidate (June 2013)
- **Languages:** Mandarin Chinese (native), Cantonese Chinese (advanced)
- **Other:** Enjoy cooking, snowboarding, and singing
- **Work Eligibility:** Eligible to work in the United States with no restrictions