

Genna Brown

Georgia State University
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Summary

A registered investment advisor with over twenty-five years experience in portfolio management and university instruction with an MBA, CFA II. I am an investment manager with technological and presentation skills as well as strong, sound ethics.

Work experience

Georgia State University

August 1999 – Present

Atlanta, GA

Visiting Instructor 2004 – 2007; Part time instructor 1999 – 2004 Finance Department. Courses include Fundamentals of Valuation, International and Corporate Finance for graduate and undergraduate students. Develop and deliver class lectures, student assignments, syllabuses and exams for assigned courses.

Financial Success

April 1998 - Present

Atlanta, GA

As a Registered Investment Adviser and sole proprietor, my responsibilities are to my clientele managing their investment portfolios and advising them on related financial issues. Determining the proper asset allocation, analyzing investment securities, determining risk tolerance for each client as well as investment reporting and business development are integral parts of my responsibilities.

Kennesaw State University

May 2001 – May 2004

Kennesaw, GA

Instructor, Department of Economics and Finance - Upper level course instruction in International Finance, Advanced Corporate as well as Corporate Finance and Personal/Consumer Finance. Full development of educational materials, such as syllabuses, class lectures, student assignments and exams.

Builder Investment Group

April 1997 - April 1998

Atlanta, GA

Vice President and Portfolio Manager - Business development and management of corporate retirement plans and high net worth individuals' investment portfolios. Responsible for asset allocation, retirement planning and portfolio management. Corporate retirement plan consultation included presentation and development of a series of investment seminars to all plan participants of large corporate clients.

University of Miami, Department of Finance

August 1989 - May 1996

Associate Faculty

Coral Gables, FL

Responsible for design and development of course work and lesson plans, as well as lectures to graduate and undergraduate finance majors in all areas of finance - international, institutions, investments, financial spreadsheet applications and case presentation courses. Classes emphasized quantitative aspects of finance but also required qualitative evaluations and applications of financial models and of current economic events. Chosen by students to be Faculty Advisor for Financial Management Association. Adjunct faculty from August 1985- August 1989

Genna Brown Consultant

August 1989 - April 1997

Atlanta, GA and Coconut Grove, FL

Multi-faceted investment consulting. Responsibilities varied from developing and managing investment portfolios for high net worth individuals, to tutoring executives in Corporate Finance, Investments and Regulatory Certification to reviewing finance text books to commercial mortgage production operations to Caribbean export business. Consulting services were concurrent with Faculty position at UM 1989 - 1996.

New York Stock Exchange Member Firms**Investment Executive**

Miami, FL and Atlanta, GA

Responsible for marketing and management of financial assets to retail clientele. Licensed with major investment exchanges. Held insurance agent licenses. Extensive product knowledge required in the areas of fixed income, equity securities, money market instruments, mutual funds and derivative instruments. Various sales awards, including Merrill Lynch Executives Club; Mutual Fund Coordinator at Paine Webber

<i>Dean Witter, Miami, FL</i>	<i>Feb 88 - Aug 89</i>
<i>Dean Witter Reynolds, Atlanta, GA</i>	<i>Feb 76 - Feb 78</i>
<i>Paine Webber, Coral Gables, FL</i>	<i>Jul 84 - Feb 88</i>
<i>Merrill Lynch, Coral Gables, FL</i>	<i>Aug 80 - Jul 84</i>

Mortgage Broker

Miami, FL

Solicited and closed second mortgages through association with realtors, bankers and attorneys, placed loans with various institutional and private lenders. Coordinated interest rate hedging activities. Wrote a mortgage loan servicing manual for mortgage executives

<i>Wills Mortgage Co., Coral Gables, FL</i>	<i>Aug 79 - Aug 80</i>
<i>Citicorp, Miami, FL</i>	<i>Jan 79 - Aug 79</i>
<i>J.I. Kislak Mortgage, Miami, FL</i>	<i>Feb 78 - Nov 78</i>

P r o f e s s i o n a l m e m b e r s h i p s

Financial Management Association

Member, FMA

June 1993 – Present

Student Chapter, Faculty Advisor

September 1993 - May 1996

Atlanta Economics Club

Member, AEC

2001 - Present

Miami and Atlanta Societies of Financial Analysts, President Miami Society (1995 & 1996)

E d u c a t i o n

University of Miami

December 1982

Coral Gables, FL

MBA; obtained degree while working full time as investment executive

Emphasis in marketing and management.

University of Georgia

June 1975

Athens, GA

BBA; Dean's List and numerous civic and collegiate activities

Major: Finance.

C o m m u n i t y a c t i v i t i e s

Atlanta Humane Society Volunteer, 1996 – Present; Project Read (Adult Literacy) Tutor; 1996- 2001

Loring Heights Neighborhood Association 1997 – 2003; President June 1999 – June 2000

CSO Community Advisory Group; 1999 – 2001 (court ordered water quality advisory group;)

Red Cross Blood Drive Volunteer; 2000 - Present (volunteer at community blood drives);

Member, Second Ponce de Leon Baptist Church 1997 - Present

L.E.A.D. - Literacy for Every Adult In Dade; Tutor (1995 - 1996)

Florida Department of Professional Regulation; Board member (1989 - 1993) Budget Chair 1992 & 1993

Coconut Grove Republican Women's Club; (1985 - 1996) Treasurer 1986 & 1987

Dade County Republican Executive Committee; (1982 - 1984)

Kappa Kappa Gamma Alumnae Association; (1978 - Present), Treasurer (1979)

R e f e r e n c e s

Professional, university and personal references available upon request