

# John McJunkin

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Passed Principles Exam of Certificate in Investment Performance Measurement  
("CIPM") April, 2007

## **Since 2003                    Investment Performance Measurement (First Citizens Capital Management)**

Investment performance measurement operations consultant. Work with outsourced vendor, Informais/Investment Scorecard Incorporated, to enhance utility of their service to client.

## **1999 - 2003                    Investment Performance Measurement (Bank of America Capital Management/Banc of America Capital Management)**

Develop automation routines for investment performance measurement operations. Responsible for Institutional Advisory Services asset allocation modeling for client portfolio strategy. Develop asset allocation models and presentations for institutional clients. Provide research support for portfolio managers, business development, client services, and management.

## **1996 - 1998                    Investment Performance Measurement (First Union/Wachovia Capital Management)**

As consultant evaluated databases of 10's of 1,000's of portfolios' rates of returns. Implemented procedures to identify and repair errors. Hired and trained team of 5 to repair old errors and reduce "new error" rate. Reduced identifiable errors 99%. Reduced "turn around" time on client requests by 90%. Procedural revisions and development of new data manipulation techniques utilizing Microsoft Access eliminated 40,000+ man-hours of work per year. Peripheral responsibilities included assisting portfolio managers, client account administrators, clients, marketing and sales force with calculating and understanding portfolio statistics.

## **1995 - 1996                    Stockbroker (Dean Witter)**

Scored 96% on NASD Series 7 exam. Passed examinations for Series 63 and 65. Also passed North Carolina Life Accident and Health examination.

## **1990 - 1995                    Investment Performance Measurement (First Union/Wachovia Capital Management)**

Integrated NCS Series 11 Trust Accounting system (now Sungard) with Cadence Investment Performance Measurement system. Brought the system online reducing paper consumption by 100,000 sheets per calendar quarter and increasing client request turnaround time from 1 day to 1 minute. Reduced monthly processing time from 2 weeks to 2 days. Reduced error rate on database of 2,000 portfolios from 10% to less than ½%. Constantly reviewed alternative technologies in portfolio management, performance measurement, asset allocation/portfolio modeling, and universe ranking. Developed a peripheral database of 40+ market index and common fund performance statistics on Lotus 123 spreadsheet which eliminated 2,000 man-hours of work per year and could instantly calculate any of over 5 trillion possible combinations of portfolio statistics requested by portfolio managers, clients, or prospects. Researched and instigated

compliance with Association of Investment Management and Research (AIMR) Performance Presentation Standards. Performed asset allocation calculations and portfolio modeling for 50+ portfolio managers. Attended annually in New York the Institute for International Research's Portfolio Performance Measurement conference. Also, attended Global Asset Management Technology conference in New York in 1995. Developed documentation and training program for performance measurement. Trained all new hires on these systems.

## **Education**

**Bachelor of Arts, Economics**  
**Overall GPA = 3.3**

**Davidson College, 1983**  
**Economics GPA = 3.7**  
**Mathematics GPA = 4.0**

## **Activities, Awards, Exams**

Certificate in Investment Performance Measurement (CIPM) Exam I (passed April, 2007)

Omicron Delta Epsilon International Economics Honor Society

Passed Level I of CFA Examination, 1986

North Carolina Real Estate Agent Exam (passed/inactive)

North Carolina Life, Accident and Health Insurance Agent Exam (passed/inactive)

NASD Series 7 (passed/inactive)

American Stock Exchange Floor Clerk, New York

French Language Honorarium

Leadership Awards from Rotary International, Exchange, and Kiwanis Civic Clubs

American Youth Foundation Award

Carpentry and House Construction

Hospice Work Volunteer

## **Personal Interests**

Family, Friends, Puzzles of all types, Computers and the Internet, Photography, Communications, Meeting new people, Psychology, "Architecting" new systems, exploring ideas, playing with my dogs and parrots.