Debra L. McNeill, CFA

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Finance Professional/Executive Management

Thirty year record of successful solutions development, high productivity and effective facilitation in the financial and business communications technology sectors.

Professional Profile

- Accomplished in the development and integration of financial management and research systems including statistical modeling and analysis, general accounting and sophisticated investment management systems which created new product offerings and provided effective internal controls.
- Highly analytical problem-solving and planning skills with proven ability to examine multi-faceted situations and develop structured resolution drawing on a unique combination of experience in finance, technology, marketing and personnel development.
- Excellent reputation for eagerly accepting new challenges outside the scope of typical operations.
- Organized collaborative planning, frequently managing successful projects with marketing, sales, compliance and IT groups.
- Skilled staff motivator and mentor providing guidance, insights, encouragement and resolution support. Routinely provided training on a broad range of topics including computer applications, personal investing, accounting and economics.

Areas of Expertise

- Financial analysis & planning
- Economic analysis & forecasting
- Strategic planning
- Corporate & competitive analysis
- Small business consulting
- Process and performance management
- Communications
- Regulatory compliance & professional integrity
- Time & cost controls
- Transition facilitation
- Quantitative analysis & modeling
- Training & leadership development

Professional Experience

Owner, Quantitative Outsourcing, Twin Bridges, MT, 2006 to present
Provide equity investment research, portfolio management consultation, economic analysis and forecasting, trading guidance, and quantitative backtesting services to a select clientele of investment managers.

- Created and implemented a low-cost, tax-efficient large/mid-cap U.S. equity investment product which has produced excellent results for the past 10 years for a small investment advisory firm. Product has been a key factor in attracting new clients. Costs for research materials supporting the investment decisions for this strategy are minimal. Regularly provide ongoing research and investment recommendation support.
- Developed a quantitative backtesting system to evaluate trading signals developed by a mid-size, technically-oriented New York investment firm and provided a detailed analysis of the potential returns based on systematic trading scenarios.
- Evaluated financial data services for various clients providing cost/benefit analyses and recommendations based on objectives and needs.

Owner, Tobacco Root Graffics dba Tobacco Root Solutions, Twin Bridges, MT, 2004 to present
www.TobaccoRootSolutions.com
Own and operate the primary resource for website development, advertising design, social media support, branding and customer communications in Madison County, Montana. Also provide services to clients in New York, Virginia and California.

- Facilitate the growth and communications of over 50 small businesses, municipalities and non-profits opening overseas revenue streams, expanding product offerings, enhancing customer interactions and developing new revenue portals.
- Examine the specific issues facing each business, formulate a precise understanding of the client's challenges and propose a progressive series of solutions to stimulate growth and promote better customer relationships.
- Assist the local hospital with a variety of special projects and on-going ancillary services including public relations, recruiting, and presentation planning.

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Owner, Tobacco Root Solutions, continued

- Customize Joomla! and Wordpress websites, modifying PHP, MySQL, CSS and HTML code to meet specific client requirements.

Portfolio Manager, Partner, Fremont Investment Advisors, San Francisco, CA, 1997 to 2004
Fremont Investment Advisors (FIA) managed over $3 billion in assets including 13 no-load mutual funds, retirement plans and private wealth accounts. FIA was a division of the Fremont Group which was owned by the Bechtel Corporation and sold to Affiliated Manager Group in 2005.

Launched a progressive record of career advancement from research analyst/trader to portfolio manager and equity partner. Managed over $300 million in enhanced equity index large- and mid-cap U.S. core strategies, including the Fremont Structured Core Fund. Evaluated and selected brokers, produced performance analytics, coordinated the development of marketing and compliance materials, and supervised trading and back-office activities. Provided regular presentations to constituent boards and produced commentaries on Fund performance and strategy.

- Established and managed optimized equity investment systems that reduced personnel costs by over $250,000/year.
- Created new indexed and enhance-indexed equity products that increased assets under management by over $80 million.
- As a member of the firm's asset allocation team, developed quantitative and fundamental U.S. economic and equity market forecasting tools that were an essential component of the team's decision process.
- As media contact for the Fremont Structured Core Fund, made guest appearance on Bloomberg Televisions, CCN-fn, ZDTV and Businessweek On-Line. Print media interviews included Reuters, Investor's Business Daily, Dow Jones News and SmartMoney.com.
- Effective career transition advisor for junior professional staff following the firm's sale. Selected to be an essential manager in facilitating the transition to the new owner.

Securities Broker, First Guarantor Securities, Butte, MT, 1996
Managed and traded equity portfolios while assisting with small-cap equity research and business development. Designed, backtested and implemented a value-oriented model for selecting and managing macro-cap stocks.

Portfolio Manager, C.M. Bidwell & Associates, Honolulu, HI, 1990 to 1995
Bidwell & Associates is a boutique investment advisory firm located in Honolulu, Hawaii.

Recruited to manage the portfolios and operations of investment firm, Denney & Denney, during the buy-out period, then transitioned to portfolio manager with the parent firm. Also performed equity and bond trading, client services and new business development in the Honolulu region.

- Developed and backtested alternative quantitative investment strategies which substantially improved the core equity portfolio returns and added diversification to the firm's quantitative research process.
- Created a consulting services product for risk analysis and performance attribution integrating models from BARRA and Northfield Information Services. Successfully marketed the product to institutional investment managers including the Montana Board of Investments.
- Instrumental to the successful transition of over 90% of the clients of Denney & Denney to C.M. Bidwell & Associates.
- Designed and implemented a proprietary portfolio performance reporting system, saving the firm over $40,000/year.

Quantitative Analyst, RCM Capital Management, San Francisco, CA, 1986 to 1990
RCM Capital Management, now part of Allianz Capital, was the premier, independent institutional investment advisor in San Francisco in the 1970-80s, integrating cutting-edge investment tools with outstanding fundamental research.

Supported the Director of Investment Strategy in evaluating potential industry returns, developing asset allocation guidelines, analyzing performance attribution and providing equity market forecasts to the portfolio managers.

- Programmed a graphic portfolio performance and data management system, saving the firm the substantial annual expense of subscribing to a third party system.

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Quantitative Analyst, RCM Capital Management, continued

- Coordinated information system development efforts between equity research/portfolio management and the MIS department, ensuring the accuracy of needs assessments and the suitability of the system design.

Research Analyst, Security Pacific Bank, San Diego, CA, 1985 to 1986
Responsible for equity research and investment recommendations in the retail and consumer non-durable sectors. Recommendations were employed by the portfolio managers in the bank's trust department.

- Created a system for the data storage, analysis and graphic presentation of Wall Street consensus opinions which was packaged as "The Wall Street Oracle" and later sold to a Wall Street investment bank.

Personal Computer Analyst, Sutro & Company, San Francisco, CA, 1984
Installed and upgraded hardware and software and resolved problems for the accounting, research and marketing departments of the brokerage firm.

EDUCATION & CREDENTIALS

CFA Institute, 1989
Completed accreditation for the designation of Chartered Financial Analyst. Accreditation requires at least 3 years of rigorous study and testing in accounting, financial analysis, economics, quantitative methods, fixed income securities, portfolio management and ethical standards.

University of California, Berkeley, 1984
B.S. in Business with emphasis in Finance and Management Science

BOARD & COMMUNITY ACTIVITIES

DebraMcNeill.net, 2015 to present
Personal blog offers insights and information on personal finance, technology, small business issues and shares interesting news items.

Treasurer/Internet Communications, Christ Episcopal Church, 2011 to present

Director of Marketing/Board Member, Greater Ruby Valley Chamber of Commerce & Agriculture, 2006 to 2011

Treasurer/Board Member, Twin Bridges Kid Country Daycare, 2004 to 2007

Board Member, Blue Oak Therapy Center, 2001 to 2004

Twin Bridges Rotary Club, 1993 to 1994

Council Member, Town of Twin Bridges, 1993 to 1996

Instructor, San Francisco Analysts Society, 1990