

WILLIAM M. MARRA

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SENIOR FINANCIAL CONSULTANT

Client-focused financial services manager with the ability to identify and develop strategic investment solutions that promote the enhancement of client objectives.

Experienced and skilled financial professional with a strong and successful record of customized financial strategies designed to achieve client objectives. Managed multiple portfolios with diligent analysis of financial trends to ascertain necessary asset allocation. Thorough evaluation and assessment of businesses and appropriate investment opportunities, including growth and diversification to effectuate bottom-line results.

CORE SKILLS & STRENGTHS

- ◆ Portfolio Management
- ◆ Strategic Client Management
- ◆ Financial Analysis
- ◆ Resource Management
- ◆ Risk Assessment
- ◆ Investment Policy Construction
- ◆ Trend Forecasting
- ◆ Market Analysis
- ◆ NASD Series 65 License
- ◆ NASD Series 7 and 66 (expired)
- ◆ Economic Assessment
- ◆ Financial Research

EXECUTIVE HISTORY

William M. Marra Consulting

June 2009 – Present

Provide independent consulting services to various financial service companies. Projects have included defined contribution provider search for an investment consulting company, and asset allocation work for an investment management company. Currently providing auditing services for a Lease Auditing company.

Selected Accomplishments:

- ◆ **Completed defined contribution provider search for investment consulting company**
- ◆ **Designed asset allocation strategies for investment management firm, included traditional and non-traditional (e.g. real estate, emerging markets, hedge fund, TIPS) asset classes**
- ◆ **Claimed and/or recovered over \$150k of common area maintenance expenses for retail sector clients over eight month period**

RAULIN, INC. | Consultant

December 2005 – November 2008

Led a team of professionals to identify and develop portfolio solutions for institutional clients. Formulated strategic asset allocation and client-specific investment models for numerous portfolios. Provided clients with investment policy construction and execution. Communicated with clients through consistent follow-up and quarterly investment report analysis and recommendations customized to meet current client objectives.

Selected Accomplishments:

- ◆ **Increased client base from 7 to 14 institutional clients**
- ◆ **Managed assets totaling more than \$500 million** for clients that included public funds, Taft-Hartley/unions, hospitals, and corporations
- ◆ **Provided invaluable market analysis** regarding financial trends to further develop client relationships

CIM INVESTMENT MANAGEMENT | Vice President

January 2004 – December 2005

Worked one-on-one with a portfolio manager in the investment of stocks and bonds to create strategic client investment opportunities. Provided investment portfolio front- and back-end analysis, as well as analysis of fixed-income and equity portfolios. Implemented new top-down equity strategy through the use of risk-management modeling software of a web-based reporting tool to increase analysis and evaluation efficiencies.

Selected Accomplishments:

- ◆ **Managed assets totaling more than \$600 million** by successfully providing strategic investment options
- ◆ **Maintained and developed relationships with more than 40 institutional clients** through consistent follow-up, quarterly report analysis and recommendations, and investment policy development
- ◆ **Chosen for Investment Policy Committee** to determine strategic portfolio positioning & presentation to clients

YANNI PARTNERS | Associate Consultant**August 1997 – March 2003**

Managed and supported more than 40 institutional clients. Engaged in substantial financial due diligence research and reviews for multiple investment managers. Developed and presented customized client reports at quarterly meetings to discuss analysis, recommendations, and forecasting relating to client objectives.

Selected Accomplishments:

- ◆ **Directly managed eight institutional clients** and supported more than 35 institutional clients through strategic asset management, asset report analysis and recommendation, and investment policy guideline development
- ◆ **Managed assets totaling more than \$1billion** through strategic client management and portfolio development for public, corporate, Taft-Hartley, and Endowment/Foundation clients

SUNTRUST BANK | Investment Performance Analyst**July 1996 – August 1997**

Calculated and analyzed investment performance of individual and corporate portfolios for an internal asset management group. Supported eight portfolio managers by creating customized client investment return reports.

MELLON BANK | Senior Trust Operations Specialist**June 1994 – July 1996**

Utilized exception reporting to reconcile, analyze, and deliver accurate Trust Department statements to high-profile clients.

EDUCATION & PROFESSIONAL DEVELOPMENT

ROBERT MORRIS COLLEGE, Pittsburgh, PA
M.B.A., Management

PENNSYLVANIA STATE UNIVERSITY, State College, PA
B.S., Accounting

NASD Series 65 License (current)

NASD Series 7 and 66 (expired)

INDUSTRY SOFTWARE EXPERTISE

**Wilshire Co-op | Zephyr Style Advisor | Zephyr Allocation Advisor | Morningstar Principia | Advent Axys
Advent Moxy | Bloomberg Professional | APT Pro | Ibbotson EnCorr**