

RICK MACDONALD, CFA, MBA, MSF, CFP®

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WORK EXPERIENCE

MINTZ LEVIN FINANCIAL ADVISORS, LLC – Boston, MA

Regional wealth management firm with \$800 million under management.

Investment Committee, November 2000 to present

- Member of four-person committee responsible for researching and recommending equity, fixed-income and alternative investments for \$800 million of client assets.
- Extensive analysis of mutual funds, annuities, 529 plans, separate account managers, hedge funds, investment partnerships and real estate.
- Responsible for conducting due diligence on all approved and candidate managers.
- Design and maintain model portfolios for use with 350 client relationships.

Senior Financial Planner, September 2001 to present

- Primary responsibility for building and maintaining 50 family relationships worth \$180 million.
- Provide comprehensive wealth management including investment advising, risk management, retirement planning, tax counseling, estate planning and education funding.
- Develop and lead client presentations and communications.
- Manage team of four financial planners to assist in client relationships.

Financial Planner, September 1999 to September 2001

- Responsible for managing several client portfolios with net worth up to \$1 million.
- Assist Senior Planners with development and implementation of customized financial plans.

HASBRO INC., HASBRO GAMES GROUP – Beverly, MA

A worldwide leader in high-tech and traditional board games.

Consultant, January 1998 to May 1998

- Developed strategic marketing plan to target non-traditional demographic segments.
- Gathered and analyzed data to identify new opportunities and create solutions.

EDUCATION & CREDENTIALS

BOSTON COLLEGE – Chestnut Hill, MA

Master of Business Administration, May 1999

Master of Science in Finance, August 1999

- GPA 3.8
- Concentration in Accounting

UNIVERSITY OF MASSACHUSETTS – Amherst, MA

Bachelor of Arts, May 1997

- *Summa Cum Laude*, GPA 3.8
- Major: Economics Minors: Spanish & Statistics
- Phi Beta Kappa

COLEGIO DE ESPANA – Salamanca, Spain

- Intensive language, literature, and cultural instruction. Summer 1996

CHARTERED FINANCIAL ANALYST®

CERTIFIED FINANCIAL PLANNER®