

FREDERICK C. "RICK" MACDONALD

Boston, MA 02114
rickmac@yahoo.com

Professional Designations:

- Certified Financial Planner (CFP™)
- Chartered Financial Analyst (CFA) Candidate (Successfully Completed Level I and Level II Exams)

Experience:

MINTZ LEVIN FINANCIAL ADVISORS, LLC, Boston, MA 9/99-pres

Senior Financial Planner

- Primary responsibility for over 50 family relationships.
- Concentration on high net worth client portfolios ranging from one to seventy million dollars.
- Provide full wealth management services including: Investment Advising, Risk Management, Retirement Planning, Tax Counseling, Estate Planning and Educational Funding.

Investment Committee Member

- Member of four person committee responsible for equity and fixed-income investment recommendations for \$600 million in client assets.
- Extensive analysis of mutual funds and Individually Managed Separate accounts.

HASBRO INC., HASBRO GAMES, Beverly, MA 1/98-5/98

Consultant

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

A. JANDRIS & SONS INC., Gardner, MA 6/97-8/97

Office Assistant

- Assembled bids, organized sales, performed two-year analysis on total production versus input cost.
- Assistant to Accounts Receivable/Payable and VP of Sales.

Education:

BOSTON COLLEGE, Chestnut Hill, MA

CARROLL GRADUATE SCHOOL OF MANAGEMENT

Master of Business Administration and Master of Science in Finance 9/97-8/99

- GPA 3.8 GMAT: 740 GRE Quantitative: 760 GRE Analytical: 760 GRE Verbal: 680
- Concentration in Accounting. Full Graduate Assistantship.
- Intramural Soccer, Soccer Tournament Team.
- Diane Weiss Consulting Competition Finalist.
- Dalhousie University International Business Case Competition.

UNIVERSITY OF MASSACHUSETTS, Amherst, MA

Bachelor of Arts, Summa Cum Laude 9/93-5/97

- GPA 3.8 Major: Economics Minor: Spanish Minor: Statistics
- Phi Beta Kappa, Alpha Lambda Delta, Omicron Delta Epsilon, Phi Kappa Phi.
- Honors Department, Dean's List, Commonwealth Scholar.
- Chancellor's Award, Economic Achievement Award, Economic Writing Award.
- Captain of Intramural Soccer Team, Playoff Qualifiers, Tournament Champions.
- Attended COLEGIO DE ESPANA, Salamanca, Spain (summer 1996). Intensive language, literature, and cultural instruction.