

GREG M. PUTNAM, CFA
University of South Carolina
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ACADEMICS

M.A. – Economics; University of South Carolina, May 1996
M.A. Thesis Topic: “Cost Functions in South Carolina Hospitals”

B.A. – Economics; University of South Carolina, May 1992
Cum Laude; South Carolina College (USC Honors College)
Honors Thesis Topic: “Human Capital Costs of AIDS in South Carolina”

Ph.D. Coursework in Economics (1 academic year); Vanderbilt University, 1997-98

TEACHING EXPERIENCE

Lecturer in Finance: University of South Carolina, Darla Moore School of Business - Department of Finance, January 2015 – Present.

- Investment Analysis and Portfolio Management – Spring 2015 (1 Section), Fall 2015 (1 Section), Spring 2016 (3 Sections), Spring 2017 (3 Sections), Fall 2017 (3 Sections)
- Corporate Finance – Fall 2015 (1 Section); Fall 2016 (3 Sections)
- Fixed Income Securities – Fall 2017 (1 Section)
- Faculty Advisor, The Carolina Fund (student organization), Spring 2016 – present
- Board Member, Carolina Collegiate Federal Credit Union
- SC Honors College Senior Thesis Director and Second Reader (multiple students)

Adjunct Teaching Summary

University of South Carolina – Columbia, SC, Spring 2015 (Finance), Spring 2008 (Economics)
Midlands Technical College – Columbia, SC, Spring 2014 (Economics), Fall 2007 (Economics)

Teaching Interests

- Investments & Portfolio Management
- Fixed Income Securities
- Corporate Finance
- Intro to Finance
- Economic & Financial Market History
- Principles of Economics

Research Interests

- Economic and Financial Market History
- Public Policy in relation to Pensions, 401(k)'s, and Other Retirement Savings Vehicles
- Market and Economic Impact of Social, Cultural, and Political Events
- Labor, Education, and Health Economics
- Political Economy
- Portfolio Management
- Global Asset Allocation (Multi-Asset Class)

INDUSTRY EXPERIENCE

INVESTMENT STRATEGIST & PORTFOLIO MANAGER Abacus Planning Group	December 2012 to May 2015 Columbia, SC
• Senior investment professional for regional firm—clients include a range of institutional (pension, endowment, foundation) and private (high net worth and large family office).	
CHIEF INVESTMENT OFFICER Savannah River Nuclear Solutions, LLC	May 2009 to December 2012 Aiken, SC
• CIO and Asset Allocation Portfolio Manager for \$3.7 billion of investment assets: \$2.2 billion Defined Benefit Pension Plan and \$1.5 billion Defined Contribution 401(k) plan.	
• Directed a complete reallocation of the pension investment portfolio—diversified within public markets asset classes, and added low-correlation strategies in alternative investments.	
• Portfolio management approach utilized a blend of active and passive strategies, including a Beta Overlay futures program for managing asset allocation targets and shifts.	
• Asset Allocation Target evolution:	
• MAY 2009 (arrival) Targets: 50% US EQ; 20% Non-US EQ; 30% Fixed Income.	
• DECEMBER 2012 Targets: 15% US EQ; 15% Non-US EQ; 15% Global EQ; 30% Long-Duration Fixed Income; 25% Alternatives (Alts consisting of: Real Estate, Hedge Fund-of-Funds, Commodities/Real Return, TAA/Global Macro, and Credit/Fixed Income.)	
• Calendar Year Returns...CY2012, +12.8%; CY2011, +5.3%; CY2010 +14.9%; CY2009, +20.1%.	
SR. ECONOMIC RESEARCH ANALYST SC Retirement System Investment Commission	October 2007 to May 2009 Columbia, SC
• Senior Economic Research Analyst with \$25 Bln public pension.	
• Investment research with respect to asset allocation, economics, and individual investments	
• Investment due diligence for Tactical Asset Allocation/Risk-Parity strategies (approx. \$3 billion): Putnam Total Return; Bridgewater All Weather and Pure Alpha; GMO Asset Allocation.	
PORTFOLIO MANAGER The South Financial Group (Carolina First Bank)	September 2005 to September 2007 Columbia, SC
• Develop and implement portfolio strategies, asset allocations, and sector weightings.	
• Portfolio Manager responsible for approximately \$300 million of AUM.	
CREDIT RESEARCH ANALYST Liberty Capital Advisors (RBC Liberty Insurance)	February 2003 to September 2005 Greenville, SC
• Credit Research Analyst & Assistant Portfolio Manager for \$1.3 billion corporate bond portfolio.	
• Follow research, credit metrics, and agency ratings for approximately 200 global corporations.	
OPTIONS TRADER Tague Securities, GmbH (Van Der Moolen Holding Co.)	June 2001 to July 2002 Frankfurt, Germany
• Trader of German equities and derivatives on the XETRA and EUREX exchanges of Europe.	
• Responsible for trade strategy, execution, and risk management (hedging of positions).	
SENIOR ECONOMIST Wilbur Smith Associates	February 1999 to June 2001 Columbia, SC
• Economist for a variety of financial feasibility, strategic planning, and economic studies.	
• Analyzed economic impacts resulting from infrastructure development/transportation projects.	

ORGANIZATIONS & INTERESTS

- CFA Charterholder since 2005; SC CFA Society President 2009-10
- Member of NABE (National Association for Business Economics)
- Interests include: writing, financial and economic history, psychology, sports, humor