

WILLIAM GEISSINGER

157 Cherry Lane
Chappaqua, New York 10514
(212) 123-4567

EXPERIENCE

DEUTSCHE BANK ASSET MANAGEMENT

New York, NY

Associate Director, Investor Relations

2006 to present

- Responsible as first point of contact for clients of Deutsche's \$2 billion hedge fund of funds business. Coordinate all client communications; identify and execute cross-selling and retention strategies.
- Organize annual conference for 150 investors with a dual purpose of client education and the promotion of Deutsche's hedge fund of funds product lines. Coordinate all aspects of event including selection of conference theme, guest speaker and panel participants. Oversee product group participation in breakout sessions.
- Managed the launch of two new investment products, coordinating the creation and dissemination of marketing collateral and writing the investment strategy document for prospective investors.
- Interface with marketing, operations, legal, accounting and compliance to facilitate funding of new accounts.

Associate Director, Large Cap Value Product Manager

2004 to 2006

- Managed client service, client retention and cross-selling initiatives for 46 clients invested in the firm's \$7 billion Large Cap Value (LCV) strategy.
- Conducted quarterly presentations to Deutsche's institutional and high net worth sales teams, clients, prospective clients and consultants regarding the impact of global economic and market dynamics on LCV portfolios.
- Oversaw the development and production of all marketing materials supporting the LCV product line.
- Created client retention campaigns during periods of underperformance. Made presentations to clients and sales force explaining reasons for underperformance and reaffirming the long term rationale of the LCV strategy.

J.P. MORGAN CHASE & CO.

New York, NY

Vice President, Institutional Client Services

1998 to 2004

- Managed institutional client relationships representing assets in excess of \$100 million.
- Presented investment results, performance attribution and other key information to U.S. equity clients.
- Communicated portfolio changes and economic outlook to investment professionals.
- Compiled and analyzed portfolio data for inclusion in client presentations with a focus on performance attribution at both the sector and individual security level.
- Networked with existing and prospective clients at industry related conferences and events.
- Oversaw daily quality control and management of data flow for client reporting.

MORGAN STANLEY ASSET MANAGEMENT

New York, NY

Associate, Marketing Services Team Leader

1995 to 1998

- Managed production of RFPs and marketing collateral, updated consultant databases, delegated assignments including workflow quality oversight across all product lines.
- Oversaw group of 10 people and developed team and individual performance standards and measures.
- Collaborated with departments throughout the organization to gather information supporting the RFP process, consultant relationships and the firm's website. Established procedures for the timely and accurate reporting of portfolio characteristics and asset growth.

- Communicated international and emerging market equity and fixed income investment strategies to the consultant and institutional investment communities in meetings, by telephone and through written correspondence.
- Completed business proposals and created marketing materials for new and existing global investment clients.
- Participated in the development of long-term strategic plans for global marketing initiatives.

FIDUCIARY TRUST INTERNATIONAL

New York, NY

Senior Portfolio Administrator, International Fixed Income

1993 to 1995

- Responsible for the daily administration of global fixed income accounts with assets exceeding \$1 billion.
- Prepared weekly client reports for investment managers detailing currency and bond exposure, as well as monthly performance reports and appraisals for portfolio managers and clients.
- Invested and monitored daily cash balances.

LONG TERM CREDIT BANK OF LONDON

New York, NY

Account Administrator

1991 to 1993

- Prepared monthly balance sheets, general ledgers, income statements, asset holdings, accounts receivable and payable, and accrued expense reports.
- Managed and invested approximately \$20 million in cash; compiled daily reports and monthly statements.
- Resolved trade problems and account discrepancies.

EDUCATION

DARTMOUTH COLLEGE

Hanover, NH

B.A., Major in Economics

May 1990

ADDITIONAL INFORMATION

- Securities licenses achieved: Series 7, 6 and 66.
- Proficient in Windows NT,[®] Microsoft Office,[®] Baseline,[®] and various proprietary portfolio management systems.