

MICHAEL KERRIS ESQ

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SUMMARY AND PROFILE

Sophisticated and innovative portfolio manager with extensive experiencing analyzing and investing in stocks, bonds, ETFs, options, futures, volatility, crypto and real estate.

PROFESSIONAL EXPERIENCE

BRIGHTVIEW CAPITAL MANAGEMENT /NJ

Analyst, Portfolio Manager & Managing Partner

2011 - Present

- ✓ Launched and manage a hedge fund focused on developing quantitative long/short systematic trading & investment strategies based on large data set analysis
- ✓ Involved in all aspects of hedge fund planning, formation, operation, portfolio and risk management
- ✓ Co-drafted syndication documents, corporate agreements, SEC /Blue Sky regulatory filings /compliance
- ✓ Strong written and verbal communication skills: develop marketing collateral; write market analysis; make investment presentations
- ✓ Manage client development, on-boarding and retention
- ✓ Manage performance reporting; manage fund administrator, prime broker, auditor and tax-advisor
- ✓ Extensive Excel usage; and work with programmers to program in Python and to automate some strategies
- ✓ Additional consulting experience:
 - Richebourg Capital, Fintech startup integrating SaaS, a multi-strat hedge fund & crypto, 2018 - 19
 - Merus Global Investments, Develop & manage trading strategies at proprietary trading firm, 2015 - 16
 - William Paterson University, Cotsakos College Of Business, Part-Time Adjunct Professor, Fall 2015
 - Taught undergraduate senior-level finance /real estate /investment course
 - Evaluations of my course scored amongst highest for new professors; was invited back to teach again

FRAMEWORKS GROUP /NY, NY

CFO - COO of Real Estate Investment & Development Firm

2003 - 2012

- ✓ Leadership:
 - Involved in all aspects of company formation, growth and management
 - Pioneer condominium developer in Rockaway, NY; developed luxury brands, drove large price increases
 - Grew startup to annual revenue of \$13.7 million (average revenue of \$7.5 million for several years)
 - Served as the President of two condominium associations
 - Also managed Lancaster Realty, purchased & operated an 11-unit commercial property
- ✓ Chief Financial Officer:
 - Negotiated and purchased several large beachfront lots
 - Raised several million dollars in equity syndications
 - Extensive modeling; researched and utilized best practices of public homebuilders and REITS
 - Active relationship with 100+ lenders; raised \$33 million in multiple financings
 - Managed corporate finance responsibilities including capital planning and cash management
 - First company in NYC in 12 years that qualified to offer FHA financing to customers
 - China Horizon Management, Part of five-person consultant team, Part-Time 2009, China
 - Advised on the purchase & development of a multi-billion dollar industrial/office complex, Beijing
 - Advised on the potential privatization of part of nationwide rail network, Hong Kong
- ✓ Chief Operating Officer:
 - Co-developed and executed strategies; managed operations; oversaw property management
 - Managed contractors, vendors and employees during multiple development projects
- ✓ Legal:
 - Managed a multitude of corporate and real estate matters in conjunction with multiple law firms
 - Drafted equity syndications, multiple contracts, and co-drafted condominium offering plans
- ✓ Sales & Marketing:
 - Developed luxury brands and obtained significantly higher average sales price than competitors
 - As a New York State licensed Real Estate Broker, hired, trained and led 3 - 7 person sales team that worked with 9,000 prospective customers and hundreds of realtors showcasing several model homes
 - Managed the entire end unit buying and rental process; constant competitive market analysis
 - Led marketing and public relations effort; featured in 30+ industry spotlight stories including two New York Times Real Estate Section cover stories, New York Post, Real Deal Magazine

MH CAPITAL PARTNERS & UBS /NY, NY

Equity Hedge Fund Analyst

2002 - 2003

- ✓ Issued long and short investment recommendations, assisted with portfolio management and strategy
- ✓ Interviewed in-person the CEOs/CFOs of ~400 public companies for investment consideration
- ✓ Developed and collaborated with network of industry specialists; utilized Bloomberg
- ✓ Hedge fund merged into one of UBS's largest wealth management groups in 2003

KERRIS CAPITAL MANAGEMEN /NY, NY

Equity Hedge Fund Analyst & Portfolio Manager

1998 - 2002

- ✓ Managed The Kerris Group, a small hedge fund with investments focused on emerging growth companies
- ✓ Conducted in-depth fundamental research, financial analysis & modeling /forecasting & valuation analysis
- ✓ Implemented long, short, and derivative positions using long-term, swing, and intra-day strategies
- ✓ Actively engaged in business development and client servicing
- ✓ Broad speaking experience including anchoring periodic live radio business program on 91.5 FM
- ✓ Extensive writing including investment plan, annual reports, and monthly newspaper column
- ✓ Tailspin Alert, Researched and wrote investment recommendation reports marketed to hedge funds, 2001

ALCHEMY FINANCE /NY, NY

Analyst

1997 - 1998

- ✓ Helped arrange nearly \$100 million of commercial loans and private equity placements
- ✓ Analyzed several multi-million-dollar real estate acquisitions and conversions
- ✓ Negotiated and drafted bank commitments, prepayment penalties, and contracts

AXIOM COMMUNICATIONS /NY, NY

Financial Officer & Operating Officer

1994 - 1997

- ✓ Co-founded telecommunications company; responsible for financial and operational matters
- ✓ Managed systems, employees, finances, equipment, and regulatory compliance
- ✓ Secured rounds of equity and debt capital to fund expansion
- ✓ Acquired four telecommunications companies; company sold to the public company World-Link Solutions

EDUCATION AND OTHERS

St John's University School of Law, NY, NY

- ✓ Juris Doctor with emphasis on real estate & corporate law, admitted to New York State Bar /1993 - 1996
- ✓ Student Bar Academic President; published editor for the NYS Bar Association's Real Property Law Journal
- ✓ Legal work Experience:
 - Ateshoglou, Kavourias & Chrysanthem-Associate for real estate and corporate law firm, 1995
 - New York State Supreme Court-Legal researcher and writer for the Hon. Justice Collins, 1995
 - St. John's University School of Law-Management consultant working directly with Dean Hasl, 1994
 - Pappas & Pappas-Associate for real estate law firm, 1994

Fordham University, College of Business Administration, NY, NY

- ✓ Bachelor of Science in Real Estate Finance and Management; GPA 3.65; Rank top 3% /1989 - 1993
- ✓ Cum Laude; In Cursu Honorum; Beta Gamma Sigma, Senior Gold Medal; Dean's List (2 years)
- ✓ 2-year honors thesis on restructuring corporations via Total Quality Management to improve operations

Certification

- ✓ CFA Institute, Chartered Financial Analyst, Level 1, 2002

Community Leadership

- ✓ High altitude mountaineering, Ironman Triathlon, ultramarathons and Krav Maga (martial arts)
- ✓ SCORE volunteer. Provided business mentoring service to business owners
- ✓ Colts Neck Architectural Review Committee, 2015 - 2017