Glenn Thomas Migliozzi, CFA
508-309-0298
glenn.migliozzi@sloan.mit.edu

Summary:

Highly skilled and accomplished finance professional with outstanding analytical, communication, business development and creative problem-solving skills with a proven record of innovation. I have led turnarounds at large firms as well as founding investment boutique firms. Regarded as an exceptional leader with the ability to excel in ever changing environments with a passion for developing, coaching, and mentoring talent.

Specialties: Teacher, financial engineer, business developer, entrepreneur, fund raiser and relationship manager.

Work Experience:

Babson College - Wellesley, MA **2017-Present**
Adjunct Lecturer – Finance, Undergraduate and Graduate Programs

Lecture Corporate Governance & Financial Compliance and Personal Finance Management courses. Create innovative class discussions and cases to enhance student personal growth and career development.

Open Table Inc. – Concord, MA **2016-Present**
Member, Board of Directors and Volunteer

Serve as member of the Board of Directors and the Finance, Development, and Capital Campaign committees for Open Table, a community supper and food pantry organization providing healthy food and support for needy families in Massachusetts.

LakeWater Capital LLC – Skaneateles, NY **2014 to 2017**
Partner & Co-Chief Investment Officer

Directed portfolio management and investment strategy themes for investment boutique firm designed to take advantage of credit inefficiencies. Led product and business development activities. Established and maintained investor relationships.

Green Eagle Capital LLC – Lake Forest, IL **2004 to 2013**
Partner & Chief Investment Officer

Founded investment management firm that managed credit hedge fund positioned to exploit the asymmetric payout of corporate bonds. Maintained investment/strategic relationships with family offices, universities, and seed investor Tiger Management.

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Northern Trust Global Investments - Chicago, IL **2002 to 2003**
Managing Director of Fixed Income

Led investment team responsible for $200 billion of fixed income. Served as primary fixed income investment contact for institutional clients/consultants and high net worth markets. Member of Northern Trust Global Investment Policy Committee.

Fleet Investment Advisors – Boston, MA **1995 to 2001**
Managing Director of Fixed Income

Managed investment department responsible for $45 billion in fixed income assets. Served as lead portfolio manager for institutional accounts and commingled funds generating top 25% performance. Member of Fleet's Investment Policy Committee.

State Street Global Advisors – Boston, MA **1992 - 1995**
Managing Director, Fixed Income/Portfolio Manager

Managed up to $40 billion in fixed income assets across global accounts. Conducted investor marketing presentations and quarterly client investment performance reviews.

Aetna Life and Casualty Company – Hartford, CT **1986 - 1992**
Director, Corporate Finance - 1989 to 1992
Investment Director, Aetna Bond Investors - 1986 to 1989

Analyzed and executed corporate transactions involving capital allocation, equity repurchases, acquisitions/divestitures and pension funding. Participated in presentations to rating agencies, insurance regulators and Board of Directors.

National Westminster Bank plc – New York, NY **1981 - 1984**
Lending Representative/Credit Analyst/Trainee

Worked in tandem with Vice President to market institutional banking products. Completed the bank's 16-month management/credit development trainee program.

Education:

Massachusetts Institute of Technology - Sloan School of Management **1984 - 1986**
S.M., Master of Science in Management, concentration: Finance

State University of New York at Albany **1977 - 1981**
B.S., Double Major: Economics and Business/Finance, magna cum laude

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Memberships, Professional Activities, and Certifications:

MIT Sloan Class of 2018 Mentor
MIT Sloan Reunion Class of 1986 Committee Leader
MIT Club of Boston
MIT Alumni Angels of Boston
CFA Institute, Chartered Financial Analyst
CFA Society Boston, Mentor: Financial Literacy Advocate and Research Challenge
Boston Economic Club

Class Lectures:

Fordham Graduate School of Business
Equity Analysis and Quantitative Finance courses: Guest Lecturer 2009-2017

Yale University
Money and Banking: Guest Lecturer 2004-2012

Media:

Television appearances on CNBC, CNN, Bloomberg News, and FOX
Radio appearances on Business Talk Radio, Reuters and WBZ
Quotes in Wall Street Journal, Boston Globe, Barron's, and New York Times
Articles in State Govt. News, Pensions & Investments, and Institutional Investor

Speeches:

"The Demographics of Investing," Foundation Financial Officers Group
"Secular Changes in the Fixed Income Market," TEXPERS Annual Meeting
"Fixed Income Market Developments," Paul L. Comstock Annual Conference
"Derivatives, The Dirtiest Word on the Street," State Treasurers' Conference
"Derivatives," Minnesota State Auditors Annual Conference

Volunteer Activities:

MetroWest Legal Services – Framingham, MA. Finance Committee, 2016 to Present
Community Consulting Teams of Boston – MIT Sloan Liaison, 2017
Memorial Congregational Church (MCC) Finance Committee Chair, 1994-2011
Fund Raising Auctioneer: MCC, Parmenter Health Care, and Jericho Road Project
Rosie's Place – Kitchen Volunteer Coordinator for Fleet Bank and MCC, 1998-2007
Sudbury Baseball Manager/Coach 2000-2007, 2015