**JOHN MORGAN**

**151 Black Rock Drive**

**Hingham, MA 02043**

**617-784-5122**

**jmorgan1.mcm@gmail.com**


## Experience

**2021 - Present** **Morgan Capital Management Family Office**
**Hingham, MA** **Partner, Portfolio Manager and Strategic Advisor**

- Manage an equity income portfolio
- Invest in U.S. real estate & Start-up companies
- Provide advice and consulting services to Start-Up companies
- Guest lecturer at Cornell Business School on investing in Global Markets
- STEM Entrepreneurship Teacher at the Boston Leadership Institute

**2023 - Present** **Thruhike**
**Kittery, ME** **Start-up company**

- Advisor to the CEO on business strategy, operations, go to market
- Paid Consultant

**2022 - Present** **Babson F.W. Olin Graduate School of Business**
**Cambridge, MA** **Finance Lecturer**

- Teach investing in Capital Markets to Masters in Finance and MBA students
- Student mentor

**2022 – Present** **Willow**
**Wellesley, MA** **Start-Up company**

- Advisor to the CEO
- Paid consultant & subject matter expert working with clients of financial advisors navigating career transitions
- Start-up investor

**2021- 2023** **Impro.AI**
**Toronto, Canada** **Start-Up company**

- Provided executive and career coaching for > thirty corporate clients
- Taught leadership skills, presentation skills and strategic decision making
- Start-up investor

**2019 – 2021** **Corbin Advisors**
**Hartford, CT** **Senior Vice President, Head of the Client Advisory Group (direct sales & client service)**

- Managed a team of six senior consultants in corporate strategy, communications and investor relations working with a clientele of public companies ranging from $1B to $45B in Market Cap
- Grew the retainer client business +40% in 2020 while retaining all existing clients
- Key Note Speaker at the NIRI, May, 2020 Webinar on Communication in the New Normal
- Guest Panelist at IR Magazine Canada Forum in October, 2020. Presented “How are investor and analyst expectations evolving going into 2021?”
- Provide financial and strategic consulting to C-Suite and Investor Relations including Quarterly Earnings Communications and Ongoing Strategic Initiatives

**2012 – 2019** **Epoch Investment Partners ($40B in assets)**
**New York, NY** **Managing Director, CIO of the International and Global Small Cap Funds**

- Lead Portfolio Manager of the Epoch International Small Cap Fund and the Global Small Cap Fund with $1Billion in combined institutional assets.

- Senior analyst with coverage of small and mid cap companies primarily in the technology, healthcare, industrial and consumer industries
- 100% client retention after being promoted to lead portfolio manager in 2017
- Managed and mentored a team of global equity analysts
- Regularly presented to existing institutional clients, institutional prospects and consultants

**2003 – 2012** **PUTNAM INVESTMENTS ($140B in assets)**
**Boston, MA** **Senior Vice President, Portfolio Manager and Senior Analyst**

- Lead Manager of the $750m Putnam Global Resources Fund (EBERX) 2008 to 2012
- Outperformed the benchmark by +1510 bps from 2008 to 2012
- EBERX was rated a Top Five Global Fund by Zacks in: 2010, 2011 and 2012
- Co-Manager of the Putnam Global Sector Fund of Funds from 2010 to 2012

**1994 – 2001** **PUTNAM INVESTMENTS**
**Boston, MA** **Vice President, Director of Institutional Sales for Mid-Market Defined Contribution, Investment Only & Pension sales in the Midwest**

- In 2000, coordinated / led sales efforts and won new business from 34 out of 36 final prospects
- Exceeded territory goals in 1999 & 2000; sold $65mm & $240mm in retirement assets
- Winner of Putnam's Annual Defined Contribution award for excellence in prospecting

**Education** **CORNELL UNIVERSITY, 2001-2003**
**Ithaca, NY** Johnson Graduate School of Management, Master of Business Administration
Teaching Assistant for 'Private Equity.' Graduate Student Council Elected Representative; Computer Hardware Sector Portfolio Manager for Cayuga Fund; Received 'Greatest Contribution to the Cayuga Fund' award by creating National MBA Stock Pitch Competition

**Granville, OH** **DENISON UNIVERSITY, 1990-1994**
Bachelor of Arts, Field of Study: Political Science, Economics
Dean's List; Student Senate; Varsity Tennis; Contributor to The Denisonian

**Madrid, Spain** **SAINT LOUIS UNIVERSITY, 1993 (s**tudy abroad)

**Designations:** CERTIFIED FINANCIAL PLANNER
CHARTERED RETIREMENT PLANNING COUNSELOR
PASSED LEVEL TWO OF THE CFA

**Personal:** Board Member of The Atlantic Symphony Orchestra & Diversified Financial Management; Tennis, Golf, Triathlons