JOHN MORGAN

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<u>Experience</u>

2021 - Present
Hingham, MA

Morgan Capital Management
Portfolio Manager and Partner

- Manage a balanced retirement income portfolio for a family office
- Completed tenure as a Senior Advisor for Samuel Financial an RIA with Commonwealth Financial

2019 – 2020
Hartford, CT

Corbin Advisors
Senior Vice President, Head of the Client Advisory Group

- Managed a team of six senior experts in corporate strategy, communications and investor relations working with a clientele of fifteen 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
New York, NY

Epoch Investment Partners ($40B in assets)
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 twenty-five 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 present to existing institutional clients, institutional prospects and consultants

2003 – 2012
Boston, MA

PUTNAM INVESTMENTS ($140B in assets)
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
- Provided investment recommendations in industrial, energy and materials industries
- Co-Manager of the Putnam Global Sector Fund of Funds from 2010 to 2012

1994 – 2001
Boston, MA

PUTNAM INVESTMENTS
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

<u>Education</u>
Ithaca, NY

CORNELL UNIVERSITY, 2001-2003
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 (Study Abroad)

<u>Designations</u>

CERTIFIED FINANCIAL PLANNER
PASSED LEVEL TWO OF THE CFA

<u>Personal:</u>

American History; Tennis; Golf & Scuba Diving; Community Service: Year-Up Mentor