

# PATRICK GREGORY

## Professor of Practice | Managing Director

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## EXPERIENCE

### Professor of Practice

#### Babson College

📅 08/2015 - Present 📍 Wellesley, Massachusetts

- Teach graduate and undergraduate courses in finance, including FIN3520 Security Valuation, FIN4530 Investments, FIN3650 Financial Markets & Instruments, FIN7200 Finance, FIN7502 Capital Markets, and FIN7503 Equities
- Faculty Director of the Babson College Fund, a two-semester program where a select group of students manage a portion of the College's endowment and are mentored by our executives in residence
- Faculty Advisor for Babson's team in the CFA Equity Research Challenge; the team won the Boston competition in 2017, 2019, and 2021 – 2024, placing them in the top 10% of more than 5,000 students that participated worldwide
- Member of the Board of Trustees Investment Committee (2017-Present), Member of the Babson College Retirement Program Investment Committee (2022-Present), Finance Division's representative on Faculty Senate (2015-16)
- Counsel students on career paths, interviewing skills, resume preparation, and networking

### Managing Director

#### Babson College Stephen D. Cutler Center for Investments

📅 03/2017 - Present 📍 Wellesley, Massachusetts

- Set the strategic direction for the Cutler Center
- Oversee experiential learning programs designed to enrich the student learning experience
- Host thought leadership forums designed to increase the visibility of finance at Babson, engage alumni, and provide networking opportunities for students
- Initiate and execute strategic partnerships with firms like Bloomberg and professional organizations such as the CFA Institute
- Provide leadership in fundraising by working with Advancement and the President's Office; recently secured a \$1 million commitment for the expansion of the Cutler Center lab and a \$500,000 commitment to expand our programming and events
- Responsible for the Cutler Center Advisory Board, which includes trustees, overseers, and high-profile members of the finance community
- Manage the Cutler Center staff

### Founder & Managing Principal

#### Grey wolf advisors

📅 10/2016 - Present 📍 North Andover, Massachusetts

- Provide consulting services to corporations, foundations and endowments, family offices, and high net worth clients

## SUMMARY

- Dynamic, engaging, and dedicated instructor with twenty years' experience teaching graduate, undergraduate, and executive education courses
- Demonstrated success in curriculum development and proponent of hybrid and fully online teaching modalities designed to meet the needs of today's students
- Extensive professional experience as a Security Analyst and Portfolio Manager
- CFA charterholder and member of the Executive Committee of the Board of Directors for CFA Boston
- Co-author of *Why Stocks Go Up and Down*

## DESIGNATIONS

### Chartered Financial Analyst (CFA)

#### CFA Institute

📅 08/2020 - Present

### Certified Risk Manager (CRM)

#### The Institutes

📅 2003 - 2008

## CERTIFICATES

### Applied Value Investing Certificate

University of Pennsylvania

### Equity Research Analyst Certificate

AnalystSolutions

### Financial & Valuation Modeling

Wall Street Prep

### Analyst Academy and AI Academy

Fundamental Edge

### ESG Investing Certificate

CFA Institute

### Master Financial Planner Certificate

Bentley College

## EXPERIENCE

### Lead Instructor and Coordinator

#### Kaplan Schweser

📅 01/2010 - 12/2020 📍 La Cross, Wisconsin

- Coordinated Kaplan Schweser's Chartered Financial Analyst® (CFA®) programs in Boston, which are offered in partnership with CFA Society Boston
- Taught in-house programs at firms such as Fidelity Investments, Wellington Management, and T. Rowe Price
- Taught 3-day seminars in select cities across the country covering the entire Level II curriculum, which includes Ethics, Quantitative Methods, Economics, Financial Reporting and Analysis, Corporate Finance, Equity Investments, Fixed Income, Alternative Investments, Derivatives, and Portfolio Management
- Conducted workshops for investment professionals interested in the CFA program, which are hosted by CFA Society Boston and held at Wells Fargo and Putnam Investments

### Instructor

#### Kaplan Schweser

📅 Date period 📍 La Cross, Wisconsin

- Taught in the weekly programs offered in Boston for Levels II and III candidates.
- Taught in-house programs offered by firms such as T. Rowe Price
- Taught 3-day seminars in select cities across the country

### Adjunct Assistant Professor of Finance

#### Bentley College

📅 01/2008 - 05/2011 📍 Waltham, Massachusetts

- Designed the course curriculum, aided student understanding and comprehension, and assessed student proficiencies in for Advanced Investments and Advanced Portfolio Theory & Practice

### Portfolio Manager

#### FM Global

📅 01/2007 - 08/2015 📍 Waltham, Massachusetts

- Integral member of an investment team managing a \$7 billion global equity portfolio
- Responsible for ~\$1.3 billion invested in the Healthcare, Technology, Media, and Telecom (TMT) sectors
- Performed detailed fundamental research on companies in coverage universe, which encompasses Advertising, Biotechnology, Broadcasting and Cable, Healthcare Services, Internet Software & Services, Life Sciences, Media, Medical Devices and Diagnostics, Pharmaceuticals, and Telecom
- Evaluated the attractiveness of securities based on an assessment of management quality, industry and company fundamentals, valuation, and upcoming catalysts
- Worked collaboratively with team members to construct a value-biased, risk-controlled portfolio
- Performed daily portfolio management tasks including risk budgeting, asset allocation, and trading
- Rebalanced holdings across sub-sectors, market cap ranges, and geographies as needed
- Responsible for the selection, sizing, and oversight of \$800 million allocated to third-party managers

## MEDIA

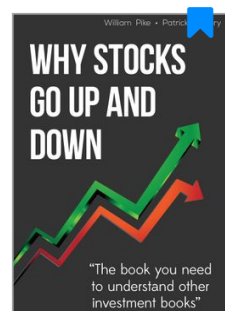
### Appears on

CNN, CNBC, Fox News, NECN, WCVB-TV, and WBZ News

### Quoted in

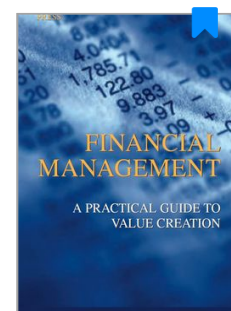
Wall Street Journal, BusinessWeek, Boston Globe, Boston Herald, Boston Business Journal, LA Times, Houston Chronicle, Computer World, Stocks, Futures, & Options, Pensions and Investments, and Yahoo! News

## BOOKS



### Why Stocks Go Up and Down, 4th

Pike, Gregory



### Financial Management, 2nd

Gregory

## RECENT PUBLICATIONS

### Case

#### Meta Platforms: A Value Investor's Dilemma

📅 2025 🔗 URL

### White Paper

#### Responsible Investing: ESG in Practice

📅 Date period 🔗 URL

## AWARDS

### Babson College Service Award, 2023

Babson College

### Graduate School Excellence in Service Award, 2018

Babson College

### Cutler Center Fellow, 2016

Babson College

## EXPERIENCE

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### Senior Analyst

#### FM Global

📅 Date period 📍 Waltham, Massachusetts

- Recruited to perform bottoms-up fundamental research of securities in designated industries
- Drafted quarterly earnings reports and reviewed corporate news/events.
- Constructed detailed valuation models used to assess important pipeline assets, estimate the company's intrinsic value, and assess market expectations.
- Fostered relationships with company management, sell-side analysts, and industry experts to gain insights into the trends/themes impacting the coverage universe.
- Provided actionable insights using a consistent, disciplined valuation approach that resulted in strong performance with low turnover.

### Managing Director

#### Bentley College Hughey Center for Financial Services

📅 04/2001 - 01/2007 📍 Waltham, Massachusetts

- Managed the Trading Room staff and provided strategic direction for the Center's research and teaching activities; awarded the Davis Fellowship
- Conducted research on the effectiveness of investment strategies utilizing various data feeds and analytical tools; routinely presented work at professional conferences, symposiums, and seminars
- Coordinated programs in trading, investment research, and portfolio management; increased student utilization from 250 to 550 students/week while increasing the number of integrated courses from 15 to 31
- Developed relationships with corporate partners, including a Premier Partnership with NASDAQ
- Oversaw the operating budget; championed cost reduction initiatives contributing \$4 million in savings
- Conducted interactive tours and trading simulations for faculty, staff, students, and visitors
- Administered the New England Tech Stock Index
- Taught graduate and undergraduate courses, including FI 710 Enterprise Risk Management, FI 701 Risk Management & Insurance, FI 650 Portfolio Theory and Practice, FI 646 Financial Risk Management, FP 602 Investments, PDS 500 Information Technology Workshop; mean teaching evaluation: 4.71/5.00

### Academic Director for Wall Street 101

#### Bentley college

📅 08/2001 - 08/2006 📍 Waltham, Massachusetts

- Directed a one-week, residential program for high school students interested in investments
- Designed the curriculum that leveraged the analytical tools of the Trading Room, taught modules in equity screening, security analysis, and portfolio optimization, oversaw the program staff, and coordinated the efforts of outside speakers

## AWARDS

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### Innovation in Teaching Awards, 2003

Bentley College

### Mascnicki Award, 2001

Bentley College

### Davis Foundation Fellow, 2000

Bentley College

## CORPORATE SERVICE

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### Board of Directors

#### CFA Society of Boston

📅 Date period

A 6,000-member organization for investment professionals working in and around Boston

### Project ACCLAIM

#### UNCF (United Negro College Fund)

📅 2024 - Present

Advisory Board member for a project designed to create student-managed funds at HBCUs

### Lighted Pathways

#### UNCF (United Negro College Fund)

📅 2024 - Present

Internship program at Boston-based investment firms to improve career readiness for students

### Advisor

#### Changebridge Capital

📅 2020 - 2022

Strategic advisor for one of the first actively managed ETFs in the U.S.

## COLLEGE SERVICE

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### Board of Trustees Investment Committee, Voting member

📅 01/2017 - Present

### Babson College Retirement Program Investment Committee, Voting member

📅 06/2022 - Present

### Classroom Advisory Council, Member

📅 09/2020 - Present

## EXPERIENCE

### Director, Graduate Programs in Finance

#### Bentley College

📅 09/1998 - 04/2001 📍 Waltham, Massachusetts

- Coordinated the development of the Master of Science in Global Investment Analysis (MSGIA) program and redesigned the curriculum for the Master of Science in Finance (MSF) program; both programs received AACSB accreditation Taught undergraduate courses including Managerial Finance, Introduction to Financial Planning, Advanced Topics in Financial Planning, and Risk Management and Insurance; received the *Innovation in Teaching Award* and was recognized as a "Key Professor" in Business 2.0
- Taught graduate and undergraduate courses, including FI 398 Advanced Topics in Financial Planning, FI 340 Introduction to Financial Planning, FI 327 Insurance & Risk Management, FI 312 Advanced Investments, FI 310 Financial Markets, GB 301 Integrated Business Functions, FI 270 Managerial Finance, FS 111 First Year Seminar; mean teaching evaluation: 4.71/5.00
- Advised the Bentley Investment Group, a \$500,000 student-managed equity fund

### Analyst

#### Northwest bancorp

📅 10/1994 - 08/1998 📍 Warren, Pennsylvania

- Recruited from MBA program to participate in the company's Management Training Program
- Fast-track promotions through a series of positions of increasing responsibility and appointed to Corporate Headquarters; promoted one year ahead of peers
- Worked with CFO and investment bankers to administer the initial public offering (IPO); prepared comprehensive investment analyses for inclusion in offering memoranda and delivered sophisticated presentations to potential investors
- Worked with VPs of Commercial Lending and Credit to assess the risk of loans to be sold on the secondary (MBS/CMBS) market
- Conducted bank risk management activities, including the development and testing of models used to estimate asset valuations and to predict returns

## COURSES TAUGHT

### Babson College

- **FIN 3520 Security Valuation**, Spring 2023, Summer 2023, Fall 2023, Spring 2024, Summer 2024, Fall 2024, Spring 2025, Summer 2025, and Fall 2025
- **FIN 3650 Financial Markets & Instruments**, Fall 2015, Fall 2016, Fall 2017, Spring 2018, Summer 2021, and Summer 2022
- **FIN 4520 Babson College Fund**, Fall 2016, Spring 2017, Fall 2017, Spring 2018, Fall 2018, Spring 2019, Fall 2019, Spring 2020, Fall 2020, Spring 2021, Fall 2021, and Spring 2022
- **FIN 4530 Investments**, Fall 2015, Spring 2016, and Spring 2020
- **FIN 7200 Introduction to Financial Management**, Summer 2016, Summer 2017, Summer 2018, Summer 2019, and Fall 2019
- **FIN 7502 Capital Markets**, Spring 2016, Summer 2020, Spring 2021, and Spring 2022
- **FIN 7503 Equities**, Spring 2017, Fall 2018, Fall 2019, Spring 2020, Fall 2020, Fall 2021, Spring 2022, and Fall 2022
- **FIN 7800 Finance**, Fall 2022

## COLLEGE SERVICE

### CFA Institute University Affiliate Program, College Representative

📅 12/2017 - Present

### Collaboration Tools Evaluation Committee

📅 12/2025 - Present

### Online Teaching Training Program, Mentor

📅 03/2020 - 12/2020

### Blended Fellows Program, Mentor

📅 09/2018 - 12/2019

### President's Task Force on Ecosystem Engagement, Member

📅 09/2019

### Centennial Planning Committee

📅 2018 - 2019

### Learning Management System Evaluation Committee

📅 2018 - 2019

### Corporate Advisory Council

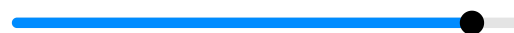
📅 01/2017 - 06/2017

### Collider Space Advisory Group

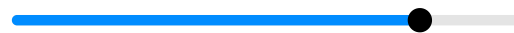
📅 09/2017 - 10/2019

## INDUSTRY EXPERTISE

### Equity Research



### Portfolio Construction



### Risk Management



### Valuation



## PROFESSIONAL ASSNS

### CFA Institute

📅 2006 - Present

### CFA Society Boston

📅 2006 - Present

## COURSES TAUGHT

### Bentley University

- **FI 270 Managerial Finance**, Summer 1998, Fall 1998, Spring 1999, Fall 1999
- **FI 310 Financial Markets**, Winter 2007
- **FI 312 Advanced Investments**, Spring 2005, Spring 2006, Spring 2009
- **FI 327 Insurance & Risk Management**, Summer 1998, Spring 1999, Fall 1999, Winter 1999, Summer 2000, Fall 2000, Winter 2001, Spring 2001, Summer 2001, Winter 2002, Summer 2002
- **FI 340 Introduction to Financial Planning**, Summer 1998, Spring 1999, Fall 2000
- **FI 398 Advanced Topics in Financial Planning**, Summer 1999, Spring 2000, Fall 2000, Spring 2001
- **FI 646 Financial Risk Management**, Fall 2001
- **FI 650 Portfolio Theory & Practice**, Spring 2008
- **FI 701 Risk Management & Insurance**, Summer 2000
- **FI 710 Enterprise Risk Management**, Spring 2001, Summer 2001, Summer 2002, Fall 2002, Winter 2003, Fall 2003, Winter 2004, Spring 2004, Fall 2004, Winter 2005, Fall 2005, Spring 2006, Fall 2006
- **FP 602 Investments**, Spring 2004
- **FS 111 First Year Seminar**, Fall 1999, Fall 2000
- **GB 301 Integrated Business Functions**, Fall 2001, Spring 2002, Fall 2002, Spring 2002, Fall 2003
- **PDS 500 Information Technology Workshop**, Fall 2001, Spring 2002, Fall 2002, Spring 2003

## EDUCATION

### Advanced Certificate in Risk Management

**University of Chicago**

📅 10/2002

### Master of Science (MS)

**Bentley University**

📅 08/1998

- Honors Graduate GPA: 3.7/4.0

### Master of Business Administration (MBA)

**St. Bonaventure University**

📅 12/1994

- Honors Graduate GPA: 3.8/4.0

### Bachelor of Science (BS)

**Indiana University of Pennsylvania**

📅 05/1993

- Double Major: Finance & Accounting

## TECH SKILLS

Capital IQ

FactSet

Bloomberg

LSEG Workspace

AlphaSense

Refinitiv EIKON

LSEG Datastream

Morningstar

Northfield

Mergent

ChatGPT

Portrait

Hudson Labs

## REFERENCES

### Paul Washburn, CFA

paul.washburn33@gmail.com

### Richard Gibble

rkgibble@gmail.com

### Chris Valios

jeremy@jeremycote.com