MAX D. ALLMAN, MA, CFA

ALLMAN & PETERSEN ECONOMICS, LLC
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WORK EXPERIENCE

Allman & Petersen Economics, LLC (Jan 16 - present) - Oakland, CA
Economist

- Determine economic damages of individuals and business entities involved in business interruption, personal injury, wrongful termination, medical malpractice, and wrongful death law suits.
- Prepare written and verbal economic reports to aid in the settlement / judgment process of legal proceedings.
- Present discounted value determination with respect to life care plans provided by life care specialists.
- Valuation of businesses and pension plans to assist in the dissolution of marital assets in divorce proceedings.

Hollis Capital Management (Jan 06 - Dec 15) – San Francisco, CA
Portfolio Manager

- Co-managed long-short equity (long-bias) hedge fund with one other individual.
- Generalist coverage.
- Involved in all aspects of the business including research, trading and risk management.

Husic Capital Management (Oct 98 – Dec 05) – San Francisco, CA
Investment Analyst

- Equity research included (but was not limited to) Financials Services, Industrials, and Natural Resource sectors.
- Supported team of portfolio managers with AUM that peaked at over $4 billion.

Portfolio Analytics and Other Duties

- Extensive analytical and operating support of Market Neutral hedge fund product.
- Developed the portfolio risk monitoring process at HCM. Provide risk management analysis (Barra U.S. E3 model) and attribution analysis (FactSet) of client portfolios with the use of risk management tools and statistical analysis for portfolio managers.
- Participated in marketing and client reviews with respect to discussion of the risk management within the portfolios.
- Developed the firm's historical portfolio performance database (a relational database constructed in MS Access). Was responsible for the maintenance and integrity of the database. Extensive involvement with project to bring HCM in compliance with AIMR-PPS and obtaining AIMR-PPS Level II verification for HCM's composites.

Bank of America (Oct 97 – Oct 98) - San Francisco, CA
***Senior Financial Analyst,* Wholesale Pricing & Analysis Group**

- Key participant in the theoretical and technical development of a Risk Adjusted Return on Capital – RAROC (value-at-risk based) loan pricing model for National Commercial Banking, Commercial Real Estate Services, Business Banking, and Trade Bank. This near-consumer-grade software, written in Excel Visual Basic for Applications, was used to evaluate new business along with overall ongoing relationship profitability.
- Participated in presentations of the aforementioned model to senior management and the nationwide rollout of the model/software application.
- Conducted specific analysis for various business units, for example, construction of a Monte Carlo analysis related to the credit risk associated with SBA-guaranteed loans.

Allman Economic Analysis (Sep 92-Oct 97) - San Francisco, CA
Economic & Statistical Analyst

EDUCATION

Chartered Financial Analyst (CFA)
Master of Arts, Economics, Specialization in Econometrics and Quantitative Methods
San Francisco State University, January 1996
Bachelor of Science, Mathematics - California Polytechnic State University, San Luis Obispo, September 1992

OTHER

CFA Institute & CFA Society San Francisco
Cal Poly SLO Male Athlete of the Year & Tennis Team Captain, 1992; NCAA Division II All-America Team, Men's Tennis, 1990-92