

Timothy L. Shaler

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Career Profile

Senior finance professional with 30 years finance and financial investment portfolio management experience. Create value synthesizing giant data sets into actionable buy-, sell- and other positive recommendations. Asset management, asset allocation, electricity finance, valuation and real estate expert. Have managed teams both in the US and internationally. Broad skills with significant experience in business development, strategy formation, and the execution of operating plans. Possess a passion for providing superior customer service.

Areas of expertise include

Market Analysis / Research
Asset Allocation
Customer Retention
Valuation

Asset Management
ESG Investments
Cross Cultural Management
Real Estate

Electricity Finance
Customer Development
International Management
Economic Research & Analysis

Professional Experience

Tim Shaler Consulting (*Orange County, CA*)

Jan 2018 – Present

Consultant regarding infrastructure financing, cash management, corporate valuation.

Projects include: Puerto Rico Power Authority, responsible sourcing of mineral tantalum, leading an RFP process for a new CFO, venture capital funding, accounting of impact / ESG investing

Christian Brothers Investment Services “CBIS” (*Orange County, CA*)

2009-2017

\$7.5 billion assets-under-management asset manager for Catholic pensions, endowments and charities

Senior Portfolio Specialist, Western Region

Relationship Manager responsible for investor portfolios. Provided strategic thinking for newly developed Asset Allocation Review Committee and actively participated in all discussions for all relevant domestic CBIS investors and prospects. Directly responsible for ¼ of all new asset growth during my time at CBIS. Indirectly responsible for much more via mentoring peer colleagues and developing key relationships. Firm-wide assets grew from \$3.3 billion to over \$7.5 billion during my time at CBIS

Pacific Investment Management Company “PIMCO” (*Newport Beach, CA*)

1999 - 2008

Now a ~\$1.75 trillion asset management company. When I left in 2008, it was a \$500bn+ fixed income manager.

Portfolio Manager

- 2006 to 2008: High Yield Portfolio Manager, Diversified Income Portfolio Manager and Insurance Company client Portfolio Manager
 - On team that won in March 2007 (for 2006) the **Pensions and Investment Award for "High Yield Bond Manager"** of the year. (Sponsors of the event: FT Business, Pensions Management and Pensions Week)
 - Won **2007 Lipper Award** for one year period for PIMCO Funds: Floating Income Fund, Instl Class, with co-managers Curtis Mewbourne and Michael Gomez

- Responsible for investments in Investment Grade and High Yield Corporate bonds in \$16.5 billion Diversified Income separate accounts and Mutual Funds
- Responsible for Investment Grade corporate bonds in \$5.6 billion insurance client portfolios
- 2001 to 2005: PIMCO's Utility Company analyst (promoted to Senior Vice President in 3/2004)
 - Covered all North America power companies as well as their overseas subsidiaries
 - Provided guidance and structure to counterparts in Europe and Australia
 - Primarily responsible for all of PIMCO's power-related bonds
 - Invited to moderate keynote panels at three consecutive annual meetings (2003, 2004, 2005) of the Edison Electricity Institute (over 2,000 attendees come to the annual convention of regulated power companies) as one of the US's most widely recognized investors in power plant project finance and utility company project debt and corporate debt
- 1999 to 2001: Portfolio Manager for Commercial Paper and Short Tenor Investment Grade Corporate bonds (promoted to Vice President in 4/2001)
- Participated in 5 Economic Forum Teams (3 Emerging Markets teams and 2 North America teams including co-leading one North America Forum Team). Each team met for three quarters and was responsible for presenting data to quarterly Economic Forums and providing forecasts for upcoming 12 month periods for the given geographic region. Was on North America team which predicted US property market 2007-2008 decline

BancAmerica Securities (Chicago, IL)**1998***\$100mm+ real-estate focused hedge fund owned by BancAmerica holding company***Associate, Asset Trading and Management**

Recommended investments in US, Hong Kong and Thailand contributing to 20%+ returns in 1998.

Fidelity Investments (Hong Kong, China)**1997***One of the largest asset management companies in the world***Investment Analyst**

Saved ~\$2 billion of investor money by recommending to Portfolio Managers in Boston they sell equity investments of South East Asian banking companies before brunt of 1997 Asian Financial Crisis.

Colliers Jardine (Hong Kong, China)**1995-1996***International brokerage and real estate and business asset valuation firm***Research Manager**Managed multi-national property research staff of two analysts and twenty data collectors. Analyzed and projected economic data used in publishing chapters in books *Asia Pacific Property Trends* and *Asia Pacific Business Essentials*, both published by McGraw-Hill. Featured in *Asian Wall Street Journal*, *Far Eastern Economic Review*, Asia Business News television and six local newspapers.**Chung Sen Surveyors (Hong Kong, China)****1993 - 1995***Largest locally owned property valuation and brokerage firm in Hong Kong***Senior Manager - Marketing & Research**

Led six person marketing effort to win Bank of China valuation contract in Shanghai, China.

Credo Corporation (Nizhnii Novgorod, Russia)**1993***Self-funded scientific exchange and medical distribution business in former Soviet Union***Founding Partner / Volunteer**

Rotary International (*Hong Kong, China*)
Rotary Ambassadorial Scholar to Hong Kong

1992-1993

Pepperdine University (*Malibu, CA*)
Financial Aid Counselor and Internal Auditor

1988-1992

Education, Awards and Professional Development

MBA -- Finance and International Business (*3.9 GPA*)
University of Chicago, Graduate School of Business (*Chicago, IL*)

- Voted Most Outstanding Student of the Graduating Class by GSB Faculty.
- Won Oscar and Elza Mayar Prize for Overall Academic Excellence.
- Associate of ARCH Corporation -- commercialized gene therapy technologies.

M.A. -- Russian, Eurasian and Eastern European Studies
University of Chicago, Social Sciences Division (*Chicago, IL*)

- Thesis: "Explaining the Large Number and Wide Geographic Distribution of Commodities Exchanges in Russia from 1990 to 1993".

BS -- Business Administration (*3.81 GPA*)
Pepperdine University (*Malibu, CA*)

- Awarded "Best Male Student" by faculty of Business Department.
- Varsity Water Polo Player, all four years. Played in U.S. national championships ("NCAAs").
- Founded and raised funds for exchange program for Soviet and American high school students.

Other education and development programs

- University of Dallas – Candidate for M.A. in practical theology
- University of Hong Kong, Studied business practices of ethnic Chinese in Southeast Asia
- Hong Kong Management Association, Certificate Course in Property Valuation
- Hong Kong YMCA, Intensive Cantonese (Chinese)
- Moscow Youth Institute, Intensive Russian language