# IAN J. RICKS, CFA

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## EDUCATION

**THE UNIVERSITY OF TEXAS AT AUSTIN, McCombs School of Business,** Austin, TX **May 2018**
**Master of Business Administration**
- 2016 UNC Alpha Challenge 1st place winner (Long CASY, CRI; Short IRBT)
- MBA Consultant for Teacher Retirement System of Texas IM Division – researched the impact of autonomous vehicles
- GMAT: 750

**WASHINGTON UNIVERSITY IN ST. LOUIS, School of Arts & Sciences,** St. Louis, MO **May 2007**
**Bachelor of Arts in Economics, Psychology**

## EXPERIENCE

**Ancient Art, LP (IA to Teton Capital Partners, LP)** - Austin, TX **April 2016 - Present**
**Research Analyst Intern**
- Buy side fundamental equity research generalist for long/short fund with $1B AUM

**MBA INVESTMENT FUND, LLC** - Austin, TX **2016 - Present**
**Portfolio Manager**
- One of sixteen students selected to actively manage long only value and growth portfolios with AUM of $24M
- Managing Director of technology and consumer sectors

**SAGE ADVISORY SERVICES** - Austin, TX **2013 - 2016**
*Institutional RIA with $12.4 billion AUM specializing in fixed-income, ETF strategies and liability-driven investment*
**Vice President of Research (2016)**
- Performed macroeconomic research supporting tactical ETF strategies – Global All Cap Equity and Core Plus Fixed Income
- Covered REIT and emerging market ETFs for All Cap Equity strategy
- Designed, implemented and monitored customized liability-driven investment portfolios totaling $1.4 billion in assets
- Led creation of an ETF-based, liability-driven investment strategy for small to mid-sized defined benefit pension plans
- Constructed and pitched customized investment solutions to E&F, insurance companies and pension plans
- Supported institutional sales team through client analysis and finals presentations to raise over $300 million in assets

**Research Analyst (2014-2016)**
- Supported Director of Quantitative Solutions in the creation and implementation of custom investment solutions for liability-focused institutions
- Worked with Director of Product Development to design and market a yield-oriented, multi-asset income ETF strategy
- Led performance attribution for all firm investment strategies and created new models and presentation framework to improve process efficiency

**Quantitative Analyst (2013-2014)**

**WENTWOOD CAPITAL ADVISORS** - Austin, TX **2011 - 2012**
*Austin-based, fully integrated real estate investment company focused on multifamily housing*
**Financial Analyst, Asset Management**
- Led financial modeling and valuation analysis to support the acquisition of a 216 asset, $1.1 billion portfolio and the acquisition of a 490-property, 82,000-unit portfolio
- Oversaw quarterly financial reporting, audit review, and capital improvements for 72 multifamily and senior housing properties
- Performed Excel-based cash flow analysis and drafted investment committee memorandums recommending transactions

**FRONTIER INVESTMENT CORPORATION** - Newport Beach, CA **2008 - 2009**
*Owner/operator of multifamily properties in California, Arizona, and Hawaii*
**Investment Analyst**

**FAMILY OFFICE, Investments** - Newport Beach, CA **2007 - 2008**
*Corona Del Mar-based family office with $2 billion in investable assets*
**Intern to Chief Investment Officer**

## ADDITIONAL

- Member of the CFA Society of Austin, The Contemporary Austin, Graduate Finance Association, Graduate Wine Council
- Skilled in financial modeling, Bloomberg/API, FactSet, S&P Capital IQ, Barclays Live, BondEdge
- Interests: Cycling, F1, live music, restoration of vintage stereo equipment