

STEVEN F. SCHREIBER, CFA

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Chartered Financial Analyst (CFA) Charter Holder

EXPERIENCE

InterServ, LLC

Director of Investments

Mobile, AL
August 2008 – Present

- Develop and manage investments in defined contribution, defined benefit, and cash balance retirement plans with over \$350 million in assets. The process includes the creation of a proprietary mutual fund evaluation and scoring process, peer group analysis using returns-based style analysis, and managed accounts for participants.
- Created mutual fund scoring process (patent pending) that is used in the CEFEX-certified investment process for retirement plans. The process incorporates returns-based style analysis and proprietary peer-group creation.

Wyndham Vacation Ownership

Senior Financial Analyst

Orlando, FL
March 2008 – August 2008

- Streamlined and improved monthly forecasting process for the company's two brands that include over 140 sites in 7 regions, by reducing the variance in actual vs. forecasted revenue to less than 2%.

HD Supply

Senior Financial Analyst

Orlando, FL
May 2007 – March 2008

- Built models and analyses to allow executives to value the division and components of the division for strategic options, some of which were used for the sale of the company to private equity firms.

InCharge Institute of America, Inc.

Manager of Business Analysis

Orlando, FL
June 2003 – May 2007

- Conducted feasibility analyses and developed profit forecast models for the various projects and business ventures proposed by the leadership team, including international expansion and new product offerings.
- Created and updated reports financial and operational reporting. My automation using visual basic macros, databases, and complex formulas in Excel reduced the time spent on reporting from 4 hours to less than a half hour per day for four analysts.

Timothy F. Downing, CPA

Tax Accountant

Manahawkin, NJ
January 1999 - May 2000

- Provided tax advice and completed tax returns for approximately 125 clients, including individual, corporate and partnership returns.
- Created system that automated firm's operations using Intuit ProSeries tax software and networking systems.

EDUCATION

University of Miami

Master of Business Administration

Coral Gables, FL
May 2002

Specializations: Finance/Investments, GPA 3.86

Graduate Assistant Scholarship with focus on E-Commerce management strategy and stock market valuations

University of Richmond

Bachelor of Arts

Richmond, VA
May 1998

Double Major: Economics and International Studies

PUBLICATIONS

- "How Strategic Alliances Affect the Value of E-Commerce Firms." E-Business Review Vol. II. 2002 p239-241.
- "International Expansion in the Electronic Marketplace." E-Business Review Vol. II. 2002 p242-245.
- Featured columnist for Wall Street Survivor stock market simulation and education website.

COMPUTER SKILLS

- Business/Accounting: Excel, Word, PowerPoint, Outlook, Publisher, Markov Processes (MPI Stylus Pro), Peachtree Accounting, QuickBooks, Intuit ProSeries Tax Software, and Solomon III
- Programming/Web: PERL, JavaScript, HTML, Visual Basic, ASP, Macromedia Flash MX and Dreamweaver
- Database/Other: Access, SQL, Microsoft SQL Server, Lexis-Nexis, Bloomberg, WRDS, COMPUSTAT, CRSP, and Avaya products

PROFESSIONAL ASSOCIATIONS

- Member - CFA Institute
- Member- CFA Society of Orlando
- Member – Professional Risk Managers' International Association
- Member of 401k review committee while employed at InCharge Institute
- ISO 9000 quality management systems internal auditor while employed at InCharge Institute