

STEVENG, CFA

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EXPERIENCE – TEACHING

TEACHING PHILOSOPHY

I believe the best way to get students excited about investments is to expose them to how investment theories are applied in the financial industry. In my lectures, I use real time data to highlight and reinforce topics studied in class.

- Courses taught: Corporate Finance, Financial Management, Investments, Capital Markets, Portfolio Management, International Finance, Student Managed Portfolio, Business Law, Business Communication and Public Speaking

ASSOCIATE PROFESSOR OF PRACTICE

Clark University, Graduate School of Management 2011 – present

- Developed and teach experiential learning courses
- Outstanding Professor of the Year 2016 and 2017

VISITING FACULTY

Harvard University, Extension School 2019 - present

Wuhan University in Wuhan, China (2019); Hefei University of Technology in Hefei, China (2018);
National Taipei University of Technology in Taipei, Taiwan (2017)

Hult International Business School (2019); Northeastern University (2013-2015); Boston College (1995-1996);
Boston University (1993, 2005)

CHARTERED FINANCIAL ANALYST (CFA)

CFA Society Boston / Kaplan CFA Review Program 1992 - present
Boston University CFA Review Program 1997 - 2002

EXPERIENCE – FINANCIAL SERVICES

WOODLAND INVESTMENTS 2008 – present

Founder and Portfolio Manager, Independent Financial Advisor

- Manage assets for high net worth clients and investment consultant to corporate retirement plans.

MFS INVESTMENT MANAGEMENT 2005 – 2008

Vice President, INSTITUTIONAL ADVISORS

- Relationship manager and investment consultant to corporate, public, endowment and foundation investors.

PUTNAM INVESTMENTS 2000 – 2004

Senior Vice President, INSTITUTIONAL RETIREMENT SERVICES

- Investment consultant to institutional clients and conducted formal investment reviews.

FIDELITY INVESTMENTS 1995 - 2000

Director, FIDELITY MANAGEMENT & RESEARCH COMPANY AND INSTITUTIONAL SERVICES

- Communicated portfolio investment strategies to institutional and retail clients.

STATE STREET BANK & TRUST COMPANY 1989 - 1995

Vice President – Commercial Lender, CORPORATE BANKING

EDUCATION

BOSTON UNIVERSITY:

Master of Business Administration, Major: Finance

BRANDEIS UNIVERSITY:

Bachelor of Arts, Major: Economics with emphasis in mathematics