

Contact

www.linkedin.com/in/troyroot5
(LinkedIn)

Top Skills

Financial Analysis

Investments

Leadership

Certifications

Bloomberg Essentials Training
Program

Honors-Awards

Comprehensive Growth Strategy
Winners ♦ Financial Analyst and
Group Leader

Troy Root

Portfolio Manager at Garda Capital Partners
Washington DC-Baltimore Area

Experience

Ad Fontes Media

Director & Shareholder

April 2023 - Present (1 year 6 months)

- * Training AI on bias and reliability.
- * Funding quality journalism.
- * Teaching media literacy.

Garda Capital Partners

7 years

Portfolio Manager

July 2019 - February 2023 (3 years 8 months)

Greater Minneapolis-St. Paul Area

Associate Portfolio Manager

January 2019 - June 2019 (6 months)

Greater Minneapolis-St. Paul Area

Analyst

November 2017 - January 2019 (1 year 3 months)

Greater Minneapolis-St. Paul Area

Trading Assistant

March 2016 - November 2017 (1 year 9 months)

Greater Minneapolis-St. Paul Area

Central Michigan University Development Board

Investment Committee Board Member (Non-Voting)

November 2014 - December 2015 (1 year 2 months)

- The Investment Committee is comprised of alumni practitioners; they make asset allocation recommendations for Central Michigan University's \$100 Million endowment.
- Participation as a Student:
 - Observe the asset allocation decision making process.
 - Conduct analysis and research for specific asset classes.
 - Examine the synthesized research conducted by consultants.

Student Managed Endowment

Chief Investment Officer/Leader of Restructuring

August 2014 - December 2015 (1 year 5 months)

Mount Pleasant, Michigan

- Student Endowment Restructuring:
 - Successfully enacted and replaced a 24 year old Investment Policy Statement.
 - Led a managed restructuring of endowments process, cost structure, and how the portfolios capital is allocated.
 - Developed new guidelines that authorize previously restricted securities; expanding into new asset classes, and established a set of risk management principles.

Charter Capital Partners

Mergers & Acquisitions and Venture Capital Intern

May 2015 - August 2015 (4 months)

- Responsible for building financial models, excel modeling, conducting due diligence, in depth research and generating pitch books.
- Provided Charter a synthesized analysis of a potential acquirer that got Charter hired by the client.
 - Conducted in depth research of a potential acquirer, including vital information about the firms operations, restructuring, financial performance, and current and future projects. I also provided an analysis which was the reason why Charter was hired.
- Discovered significant issues while conducting due diligence on a client in the oil & gas services industry; also found a severe miscalculation in the valuation models maintenance Capex. Every potential buyer, but one, dropped out because of the issues I had warned about.

Association for Corporate Growth

Valuation Analyst for Mergers & Acquisitions Case

February 2015 - February 2015 (1 month)

- Finished 2nd with half the resources.
- Analyzed complex business case and presented valuation, strategies, strategic alternatives and financing options to the board of directors.
- Completed profound due diligence to derive the company's valuation range using discounted cash flow, leveraged buyout, precedent transaction, and comparable company analysis models.
- Presented strategic suggestion to the board of directors based on our analysis and knowledge of deal structure.

Northwestern Mutual

Financial Advisor Intern

May 2013 - August 2014 (1 year 4 months)

Ann Arbor, MI

- Managed an independent financial practice; wrote \$51,000 in premium credit.
- Responsible for prospecting, scheduling meetings, and building my own client base.
- Conduct audit of clients needs, then independently analyze the clients goals and objectives.
- Synthesize the information to conduct a comprehensive and strategic financial plan.
- Present the plan to clients.

CBOE

Investing and Trading for College Students

July 2013 - July 2013 (1 month)

- Mock trading in the E-Mini S&P 500 pit.
- Learned complex derivative pricing models, the use of greeks in option strategies, and different strategies institutional investors use to hedge their portfolios.

Young Entrepreneurs Across America

Branch Manager

June 2012 - August 2012 (3 months)

Howell, MI

- Operated and managed an exterior painting business, responsible for recruiting, hiring, marketing, booking business, conducting payroll and managing financial position to maximize profitability.
- Analyze risk and profitability of future projects.
- Top 5 producer in the country.
- Generated \$68,000 of revenue and led the country as a top 5 manager.

Education

Central Michigan University

Bachelor's Degree, Finance · (2011 - 2015)