

Form Name:
Submission Time:

Citizens Commission
February 4, 2019 2:02 pm

Name	Brendan Corcoran
Address	[REDACTED] [REDACTED]
Phone	[REDACTED]
Email	[REDACTED]
Citizenship Affirmation	I am a U.S. Citizen
Residency Affirmation	I am a resident of the Commonwealth of Massachusetts
Statement of Intent	I intend to comply with and advance the policy established by this Act.

Statement of Interest

I am writing to convey my interest in serving on the Citizens Commission Concerning a Constitutional Amendment for Government of the People.

I currently serve as a Partner at Partners Capital Investment Group in Boston. Partners Capital a global investment office serving endowments, foundations and high net worth families. My personal focus is serving non-profit clients (primarily school endowments). I spent the last two years as Head of North America, setting the strategic direction for our North America business, which represents approximately 40% of the firm's client assets and revenue.

My experience in building and leading a growing private enterprise in Massachusetts would be valuable to the important work of the Citizens Commission. I am a strong advocate for progress and social justice, and I also understand the challenges of running a business. I will bring a progressive perspective to the Commission that also provides due consideration to private sector concerns. Also, at 33 years old, I hope to serve in this discussion as a voice for the youth of the Commonwealth - the nearly half of our citizens under the age of 35.

Please let me know if there is more information that I can provide about my experience or qualifications to assist with your decision.

Best regards,
Brendan Corcoran

Résumé or Summary of Qualifications Upload	https://s3.amazonaws.com/files.formstack.com/uploads/3282862/71887710/475067689/71887710_brendan_corcoran_cv_2019.pdf
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Political Party Affiliation, if any, over the previous five years	Democratic
City or Town where you reside	CAMBRIDGE
Employment Status	Employed
Occupation	Investment Management
Employer	Partners Capital Investment Group, LLP

BRENDAN CORCORAN, CFA

EXPERIENCE

PARTNERS CAPITAL INVESTMENT GROUP, LLP

BOSTON, MA

Partner

July 2016 – Present

Senior Principal

January 2014 – June 2016

Principal

January 2011 – December 2013

Senior Associate

September 2009 – December 2010

Associate

August 2008 – September 2009

- Senior investment professional at global investment office providing independent investment advice to endowments, foundations and families, with over \$25 billion in total assets advised.
- Serve as lead Partner to Partners Capital's largest US non-profit and institutional client relationships, including NYU School of Law Foundation, Milton Academy, Berkshire School, Breck School and a defined benefit pension plan for a leading global law firm.
- Served as Head of North America from 2016 to 2018, leading all aspects of office and business management for Partners Capital's North America business. Responsibilities included day-to-day management of the Boston and New York offices, human resources activities (including recruiting, mentoring, performance evaluation and compensation) and new business development.
- Lead portfolio management activities for approximately \$2 billion in client assets, including largest US client account, largest US endowment client, and flagship multi-asset class investment vehicle for US investors; deliver end-to-end investment program, including investment strategy and asset allocation, manager selection, risk monitoring and execution and reporting.
- Investment research is primarily generalist-oriented. Specialized in Private Equity investment research from 2008 to 2013 before transitioning to current multi-asset class focus.

JEFFERIES & COMPANY, INC.

WALTHAM, MA

Analyst, Technology Investment Banking

Summer 2006, July 2007 – July 2008

- Investment banking analyst role focused on digital media and software sectors.
- Received "top bucket" analyst ranking after first year.
- Developed and applied financial models to evaluate the impact of M&A transactions and equity financings and performed firm valuation using discounted cash flow, comparable company and transaction analyses.

EDUCATION

HARVARD COLLEGE

CAMBRIDGE, MA

A.B. in Government; Secondary Concentration in Economics; June 2007

OTHER QUALIFICATIONS / PERSONAL

- Member of YW LeadBoston Program, Class of 2019
- CFA® Charterholder
- Proficient in Microsoft Office suite (Excel, PowerPoint, Word) and Bloomberg.
- Interests include fitness, Boston sports, music, government and personal finance.