

Form Name:
Submission Time:

Citizens Commission
January 31, 2019 4:29 pm

Name	Daniel Brady
Address	<div></div> <div></div> <div></div>
Phone	<div></div>
Email	<div></div>
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	<p>We the People. America is built on the premise of peaceful and fair elections, where one man's word is equal to another's, regardless of class. Artificial entities and concentrated money can distort the voice of the people. This is not a republican or democrat issue, and as such it should be approached with political identities set aside. Taking a fair look at these impacts on campaign financing and the like is a serious matter, and one in which I feel equipped to assist.</p>
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I believe I am qualified to serve on this committee for three reasons:

- 1) I have a history in the finance industry and my CFA designation, giving me expertise in areas that are relevant to campaign financing.
- 2) I am very open-minded and consider myself an independent. I will go into this committee with no presumptions and without bias. While I have voted Republican in recent years, I consider myself an independent and always evaluate each candidate separate from party affiliation.
- 3) I am team-oriented and work well in driving results in a timely manner using all the research available to us. I'm sure this committee will consist of very intelligent people from all walks of life, and I am happy serving in any role that the group determines fit. My flexible schedule will also allow me to easily attend every meeting.

Please consider this my official letter of interest to be appointed to the Citizen's Commission. I very much look forward to hearing back.

Thank you!
Dan Brady

Résumé or Summary of Qualifications Upload	https://s3.amazonaws.com/files.formstack.com/uploads/3282862/71887710/474235802/71887710_brady_daniel_resume.pdf
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Political Party Affiliation, if any, over the previous five years	Republican
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Clty or Town where you reside	BOSTON
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Employment Status	Employed
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Occupation	Financial Sales
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Employer	Trendrating
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DANIEL R BRADY, CFA

WORK EXPERIENCE:

- Senior Sales Executive, Trendrating SA*, Boston, MA September 2017 – Present
- Travel the country presenting our momentum analytics platform to equity analysts and portfolio managers
 - Develop relationships with key decision makers at the largest wire houses to spread the awareness of our company
 - Understand client needs and expectations in order to improve the service offering and improve client experience
- Regional Sales Representative, MFS Investment Management*, Boston, MA August 2015 – September 2017
- Developed a strong working relationship with both clients and prospects in two key US markets
 - Understood and responded to client questions regarding economic conditions and patterns, financial data and fund trends
 - Developed and implemented ideas to generate new sales. Worked with two external wholesalers in finding innovative ways to position existing products and generate interest in our investment approach
- Financial Analyst, VOIPO, LLC*, Irvine, CA June 2014 – July 2015
- Reported directly to CEO with project analyses, including competitive cost structures and profitability ratios
 - Provided analytical advice on transaction trends to increase top-line profitability by reducing costs
 - Maintained documentation of policies and regulation procedures supporting various reports and deliverables
- Client Account Manager, Brown Brothers Harriman*, Boston, MA September 2013 – June 2014
- Worked effectively with internal departments to prioritize client requests, deliverables and issue resolutions
 - Performed review and reconciliation of daily transactions, ensuring accurate calculation of Net Asset Values
 - Ensured accurate and timely processing of over 200 mutual fund portfolios with asset values of up to \$22 billion

EDUCATION:

- CFA Charter Holder, CFA Institute**
- Bentley University**, Waltham, MA
- Bachelor of Science, Finance, 2013
 - Relevant Courses: International Finance, Global Strategies in Business, Seminar in Venture Capital, Emerging Markets, Derivatives, Financial Markets and Investment, Advanced Managerial Finance, Business Law, Integrated Business Project, Business Processes and Systems
- University of Virginia, Semester at Sea**, Fall 2011
- Visited 12 countries on an educational voyage around the globe (Morocco, Ghana, South Africa, Mauritius, India, Malaysia, Vietnam, Hong Kong, China, Japan, Hawaii, Costa Rica, and Honduras)

ADDITIONAL EXPERIENCE:

- Consultant, Randol Management Consultants, LLC*, Waltham, MA September 2012 – April 2013
- Researched, collected, and recorded information relating to CPG, retail, and technology companies' financial performance, financial standing, productivity performance, and related disclosures in their SEC filings
- Micro-Finance Intern, Government of Ghana (MASLOC)*, Ghana, West Africa June 2012 – August 2012
- Evaluated business practices of small businesses in the poultry industry by travelling from village to village
 - Generated a business plan that helped improved the relationship between the micro-finance institution and the lenders, primarily focused on gaining trust through sound financial accounting practices

ADDITIONAL INFORMATION

Computer Skills: MS Word, Excel, PowerPoint, Salesforce, Constant Contact, Bloomberg and FactSet

Hobbies: Reading, Travelling, Tennis and Investing

Communication: *First Place Statewide (MA)*, Investwrite Writing Contest, "A Comparison of ExxonMobil and Goldcorp"

Licenses: Series 6 and 63