

RAST GOZEH

PROFESSIONAL EXPERIENCE

KASSIRA WEALTH MANAGEMENT | 2019 - PRESENT

CHIEF INVESTMENT OFFICER | 2019 – PRESENT

Implementation expert for customized client solutions for financial portfolios.

Financial Advisor and Planner – navigating clients through the most difficult financial solutions.

SIERRA NEVADA CORPORATION | CENTENNIAL, CO | 2019 - 2021

PROJECT ANALYST II | 2019 – PRESENT

Analyzed Government Contracts and Programs to ensure on time delivery and under budget.

- **Budgeted R&D costs** for internal stakeholders. Outlined proposal and bidding process from a finance perspective.
- **Reported program performance** to Program Managers and Owners on a monthly basis.

T. ROWE PRICE | COLORADO SPRINGS, CO | 2011 – 2019

GLOBAL INVESTMENT MANAGEMENT ANALYST (BUSINESS/PRODUCT ANALYST) | 2017 – MARCH 2019

Deliver analysis of intermediaries holding T. Rowe Price funds for purchase opportunities; review business environments, develop proposals, and negotiate options, with focus on securing best prices. Provide fund information to consultants and external partners—each quarter, provide detailed data on AUM and intermediary sales. Participate in market and fund update meetings and serve as representative on several committees discussing future of investment operations.

Drive product analysis, strategy, development, and implementation of solutions to enhance client experience, improve processes, and grow revenue. Continually assess opportunities for change and lead efforts to introduce new products—consult directly with clients and internal stakeholders on needs, concerns, and potential solutions.

- **Retained \$2.9B in AUM (with expected \$3.5B in flow over next two years)** through creation of largest Sub-Advised Multi-Asset Fund of Funds product strategy for major client; designed new digital communication channel for investment staff and custodians.
- **Reduced risk on \$10B+ in assets** through development of innovative Global Fee Payment system (currently being implemented).
 - Researched laws, regulations, and processes to create a comprehensive project plan to reduce high-risk contracts, modernize fee payment function, and streamline processes.
 - Presented solution to board (with Legal team).
 - Modernized 12B1 program, as well as intermediary contracts, leading to better scores from intermediaries.
- **Grew net revenue 22% compared to peers without a contract** through launch of revenue-sharing program; created complex financial model, analyzed competitor offerings, and engaged in platform deals for Advisor, RIA, and DCIO engagement.
- **Lowered risk on managing \$45M/month in expenditures across multiple departments and clients** through implementation of innovative payment-technology solution.
- **Played lead role in design of new Stable Value fund product for reimbursing costs—which gained immediate investment from Fidelity—for Distribution side of business.** Consulted with Head of Product, researched compliance issues, and created tools for portfolio managers.

FINANCIAL INSTITUTION SERVICE SPECIALIST/ASSOCIATE (2014 – 2017)

Evaluated alignment of individual securities with company's investment philosophy through delivery of Discounted Cash Flow (DCF) and other financial-modeling techniques. Created portfolios aligned with specific offerings (SMA, CIT, mutual funds) and worked on initiatives to develop new strategies and long-term vision for CIT. Teamed with global consultants and banks to deliver executive-level presentations on new products and onboard solutions and investment strategies.

T. ROWE PRICE

FINANCIAL INSTITUTION SERVICE SPECIALIST/ASSOCIATE (CONTINUED)

(Continued)

- **Oversaw 133% growth in global AUM** through onboarding of first global customer (insurance company) to U.S.-based product, which required hedging strategy.
- **Boosted productivity** through design of new cloud-based data management software that provided a central location for relationship managers to post and manage communications, connecting all notes on one page and ensuring everyone had the most up-to-date information to execute the transaction.
- **Processed securities in-kind (for \$50B in transactions over 2 years)**, which required valuations of both private and public equity to see which would fit the overall models for Mid-Cap Equity strategy.

SENIOR SALES AND RETENTION SPECIALIST (2013)

RETIREMENT SPECIALIST (2012)

RETAIL ACCOUNT MANAGEMENT SPECIALIST (2011)

Promoted quickly through early roles consulting on investment strategies, working with sales to provide guidance on individual investor platforms and strengthening relationships to ensure client satisfaction. Gained deep understanding of SEC/FINRA requirements for mutual funds.

EDUCATION & CERTIFICATION

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| Master of Business Administration University of Colorado | 2014 |
| Bachelor of Science in Finance and Human Resources University of Colorado | 2011 |
| Series 7 and 66 Licenses FINRA | |
| CFA Charterholder | |
| CERTIFIED FINANCIAL PLANNER | |

RECOGNITION

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| Community Leadership Award NAACP | 2008 |
| - Recognized for assisting military with deployment strategies. Trained language, culture and awareness of Middle East before deploying. | |