

GLENN E. ATKINS, CFA

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geatkins@cox.net

I am a self-motivated, proven performer skilled in portfolio management and analysis, high-net worth and institutional client contact, investment research, financial modeling, financial accounting, reporting, and planning and public/private company analysis.

I have extensive experience analyzing trends, conducting analysis and identifying business opportunities in both the public and private company sectors. My experience ranges from the smallest investment-management start-ups to the most respected Fortune 500 companies. My experience also includes private equity analysis/investment in technology start-ups, trucking & logistics technology start-ups, and real estate development investment and analysis. I am an accomplished public speaker and published author. My performance excels with little supervision, tight deadlines, and multiple projects.

CORE COMPETENCIES

- Investment Portfolio Management
 - Budgets & P&L Accountability
 - Capital Structure Analysis & Optimization
 - Financial Modeling, Analysis & Projections
 - Strategic Business & Financial Planning
 - Cash Flow Analysis & Management
 - Financial Statement Reporting & Oversight
 - Extensive M&A Analysis & Evaluation
 - Private Equity Analysis & Evaluation
 - Key Client & Investor Contact
 - High Net Worth Client Contact
 - Client Focused
 - Executive Presentation Creation & Design
 - Communication Skills – All Constituencies
 - Excel, Access, Word, PowerPoint
 - Excel VBA Programming
 - Visual Basic Programming
 - Database Management – PHP/MySQL
 - Web Site Design & Programming (Dreamweaver)
 - Marketing Planning & Materials Development
 - Monte Carlo Simulation & Probability Analysis
 - Bloomberg Financial Markets
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EDUCATION

Bachelor of Science in Business Administration (BSBA) • *University of Arkansas – Fayetteville, AR – 1987*

Chartered Financial Analyst (CFA) Charterholder • *CFA Institute (www.cfainstitute.com) – Charlottesville, VA – 1993*

Additional Accounting Courses • *University of Arkansas at Little Rock – Little Rock, AR – 1992*

- *Cost Accounting* • *Accounting Information Systems* • *Auditing* • *Federal Taxation*
- **Currently Eligible to sit for the Arkansas CPA Exam**

Honors Portfolio Management II – Raymond Rebsamen Trust Fund • *University of Arkansas – Fayetteville, AR - 1987*

(Admittance to this class is by permission only at the discretion of the professor)

- Selected as Portfolio Manager for an equity endowment fund with assets in excess of \$290,000
- Reviewed research efforts of 14 other students
- Coordinated research efforts into overall portfolio objectives and recommendations
- Received annual internship with Wall Street specialist firm (See Fernandez, Bartsch & Mirra under Professional Experience)

Licensed Realtor (Former) • *Edmiston-Prewitt School of Real Estate – Fayetteville, AR - 1983*

PROFESSIONAL EXPERIENCE

GARRISON ASSET MANAGEMENT, LLC, Fayetteville AR 1994 - Present
 (Formerly Garner Asset Management Company, LLC & Llama Asset Management Company, LP)

*Llama Asset Management was owned by members of the Walton Family, founders of **Wal-Mart Stores, Inc.***

*Garrison Asset Management is owned by members of the Garrison Family, founders of **American Freightways** (Harrison, AR) which was sold to **Federal Express** in 2000.*

Executive Vice President, Director of Research, Fixed Income Portfolio Manager & Chief Compliance Officer

- Functioned as Chief Financial Officer for Garner Asset Management
- Oversight responsibility for all areas of financial accounting for Garner Asset Management
- Responsible for Securities & Exchange Commission (SEC) Compliance Policies & Procedures
- Drafted Investment Advisor Compliance Manual & Standards of Professional Conduct
- Responsible for Internal Audit function related to SEC compliance
- Liaison between SEC field examination staff and firm
- Coordinated and conducted fundamental equity and fixed income investment/security research efforts for \$225 million in assets for 19 institutional and 65 individual clients
- Performed extensive financial analysis on individual companies and securities with a particular emphasis on bond rating models and relative ranking systems
- Developed and implemented proprietary bond rating models
- Developed and implemented proprietary, multi-security bond ranking models
- Created and programmed proprietary Monte Carlo simulation models in Excel VBA for use with the firm's institutional and individual clients
- Reported & maintained buy/sell recommendations to the firm's president and chief investment officer
- Continually monitored and reported on changing credit fundamentals & relative value
- Created and maintained proprietary financial analysis models
- Drafted and produced the firm's marketing material which was used to market money management services to institutional and individual clients throughout the United States
- Primary responsibility for drafting the firm's responses to requests for proposals (RFP's)
- Assisted in the development of firm-wide budgets and strategic plans
- Created and published the firm's quarterly newsletter that is distributed to approximately 1,000 contacts
- Regularly marketed the firm's investment services to institutional and individual clients, plan sponsors and financial planners
- Maintained an internal database of prospective clients
- Oversight responsibility for the client reporting and management information system functions
- Assisted the corporate finance department of Llama Company (a regional broker dealer and sister company of Llama Asset Management) in merger and acquisition analysis and asset valuation
- Coordinated and managed all research staff in high grade and high yield bonds
- Assisted in the development and marketing of a collateralized bond obligation (CBO) project
- Presented to senior Moody's and Standard & Poor's product analysts regarding the credit structure for the CBO product
- Presented to major institutional clients and "road shows" throughout the country for the CBO product

WORTHEN TRUST COMPANY, INC., Little Rock, AR 1993 - 1994
Vice President, Assistant Manager - Investment Division

I voluntarily left Worthen when it became apparent that a merger with Boatmen's Bank was imminent.

- Directly managed \$80 million in fixed income accounts including "core" bond accounts, nuclear decommissioning trusts and commingled accounts
- Responsible for the successful restructuring and consolidation of the firm's cash management/money market mutual funds. Conducted extensive analysis of virtually every major provider of money market mutual funds
- Member, *Trust Investment Committee*

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- Member, *Trust Administrative Committee*
- Responsible for investment decisions, asset allocation, and security selection for approximately fifteen trust administrators
- Reviewed trust accounts and marketed trust services to clients including high net worth individuals, pension plan sponsors, employees, corporations, endowments, and specialized investment funds
- Developed successful new business proposals for pension plans, high net worth individuals, and other clients. Includes the development of asset allocation models, security selection, and presentation graphics
- Designed and assisted in the preparation of a monthly investment newsletter which was sent to the firm's clients
- Formulated and prepared various departmental policies and procedures
- Interacted with internal and external audit personnel regarding various investment, procedural, and compliance issues
- Responsible for reviewing and formulating recommendations for closely-held assets, limited partnerships, and worthless securities. Developed procedures for the review of closely-held assets

GARNER ASSET MANAGEMENT CORPORATION, *Little Rock, AR*
Senior Vice President, Director of Research, and Portfolio Manager

1991 - 1993

- Coordinated and conducted fundamental investment/security research efforts for \$250 million in fixed income assets
- Portfolio manager for the daily cash management activities of the firm's clients
- Assisted the portfolio manager on the firm's investment grade fixed income portfolios
- Participated in regular marketing and presentation visits to plan sponsors, consultants, and clients throughout the United States
- Oversight responsibility of the internal financial accounting function, client reporting, and management information systems
- Responsible for developing firm business plans and marketing objectives in conjunction with other firm members
- Created and maintained proprietary financial analysis models
- Responsible for the debt security restructuring & workout efforts of the firm's clients. Member of senior creditor committees for large, nationally recognized Chapter 11 reorganization proceedings

ATLANTIC CAPITAL AND RESEARCH, INC., *Little Rock, AR*
(Investment subsidiary for Fortune 500 Insurance Company Monarch Capital Corporation)
Director of Research & Portfolio Manager

1987 - 1991

- Assisted the portfolio manager for the firm's investment grade fixed income portfolios representing assets of approximately \$1 billion
- Senior level responsibility for credit decisions on \$1 billion in fixed income assets, of which approximately \$400 million represented high yield securities
- Portfolio manager for the daily cash management activities of the firm's clients
- Managerial oversight responsibility with respect to junior security analysts on the firm's staff
- Extensive financial statement analysis experience with a focus on cash flow analysis, asset values, comprehensive leverage buyout analysis, and purchase accounting reconciliations
- Diverse covenant and indenture analysis with a particular emphasis on high yield and investment grade bondholder protection
- Made quarterly portfolio/performance presentations to the Board of Trustees for the VISTA High Income mutual fund
- Assisted portfolio manager in the trading of investment grade and high yield securities
- Marketed High Income product to prospective institutional clients
- Presented quarterly performance results to clients

FERNANDEZ, BARTSCH & MIRRA, *New York, NY*
(New York Stock Exchange Specialist Firm), New York, NY
Intern

Summer 1987

- Clerk experience on the floor of the New York Stock Exchange
- Assisted stock trader in trading the firm's "house" account

- Security analysis experience working with the firm's analysts
- Secondary emphasis on high yield debt analysis

PROFESSIONAL ACTIVITIES & ACCOMPLISHMENTS

LECTURES

- Guest lecturer, *Harvard Business School*- First Case Study on High Yield Securities
- Guest lecturer, *University of Arkansas*
- Junior Achievement Presenter, Woodland Junior High, Fayetteville, AR
- Guest speaker for the Stock Market Game, Woodland Junior High, Fayetteville, AR
- Guest speaker for the Stock Market Game, Mablevale Junior High, Little Rock, AR

PUBLICATIONS

- Contributing author for a book on bankruptcy entitled Bankruptcy Investing, published in July, 1992 by Dearborn Financial, Chicago. Book was recognized by *Forbes* magazine as one of "...the best from the class of '92" (October 26, 1992, p. 298)
- Regular guest contributor of financial articles for the *Northwest Arkansas Business Journal*
- Formerly a rotating author for the column Wise Investments, published weekly in *Arkansas Business*
- Published articles for other leading financial journals including the *American Association of Individual Investors Journal*

BOARD MEMBERSHIPS

- Garrison Financial Institute, University of Arkansas - <http://gfi.uark.edu/>
- EquityNet - www.equitynet.com

PROFESSIONAL ORGANIZATIONS

- Member of the Arkansas Society of Financial Analysts
- Member of the CFA Institute, formerly the Association for Investment Management and Research (AIMR)

ACCOMPLISHMENTS

- Selected to the list of "40 Under 40" Business Leaders in Northwest Arkansas by the *Northwest Arkansas Business Journal* in 1996

PERSONAL INTERESTS & REFERENCES

CIVIC INTERESTS

- Member of the Rotary Club of Springdale, Arkansas
- Past member of the Board of Directors of the Fayetteville Youth Center
- Past member of the Board of Directors of Big Brothers / Big Sisters of Northwest Arkansas
- Served as Assistant Area Coordinator for an Arkansas Candidate for United States Senate

PERSONAL INTERESTS

- Golf
- Scuba Diving
- Real Estate Leasing & Development
- Investing
- Computer Modeling

REFERENCES

- Available on request