

# Adam C Britt

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- Profile** I am interested in challenging tasks with an emphasis on strategic planning, process improvement, financial/market analysis, team building, leadership, corporate governance, business development, and ideation.
- Experience**
- Senior Performance Analyst**  
*McDonnell Investment Management, Oak Brook, IL 2008 – Present*
- Reconciles cash and positions for institutional accounts over \$5 million
  - Responsible for all reporting for the largest client at McDonnell Investment
  - Generates performance reports for clients including return, market value, book value, and yield information
  - Creates presentations for prospective clients and aids marketing group
  - Produces outlier reports and presents investment methods that add value to each investment strategy
  - Calculates composite information in compliance with GIPS
  - Supports sales department with composite information
  - Implemented new system to transfer holdings, income and transaction reports to clients
  - Assists portfolio managers, custodians, and financial advisors with account information
  - Improved processes by creating a workflow that generates 300 client reports
  - Responsible for any audits both internal and external
- Staff Accountant**  
*McDonnell Investment Management, Oak Brook, IL 2006 – 2007*
- Reconciled cash and positions for all separately managed accounts
  - Formatted incoming data to process with Recon®
  - Updated variable rate coupons and factor updates as needed
  - Resolved issues concerning trade errors and accounts with a negative balance
- Assistant Treasurer**  
*The Genesis Foundation, Valparaiso, Indiana 2004 – 2006*
- Maintained account records and wired all incoming revenue
  - Reconciled and processed invoices for accounts payable
  - Developed internet marketing strategy for the PreferredProgram®
  - Researched housing market trends of first time home buyers
- Education**
- Masters in Business Administration:** Concentration in Finance and Management  
Northern Illinois University, DeKalb, IL : 2014
- Bachelor of Science in Business Administration:** Major in Finance and Marketing  
Valparaiso University, Valparaiso, IN : 2006
- Skills** Microsoft Excel, Word, PowerPoint, Outlook, Bloomberg, Eagle Investment Systems, SS&C Recon, APL, and Perform.