**THOMAS RIMER**

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**Updated: April 2020**

**CAREER SUMMARY**

Twenty years of experience in the financial industry, along with a solid academic background, has given me the ability to teach finance from a strong theoretical perspective while giving students insights into how finance theory translates into actual, real-world application. Classroom instruction has been delivered in a small section setting (16-50 students) as well as mass lectures (300+ students). I am now seeking to further enhance my ability to teach and do research by pursuing a Doctoral degree.

**EDUCATION**

**Master of Business Administration**, December 2000

Wayne State University, Detroit, Michigan, USA

Area of Concentration: International Business

**Bachelor of Arts (Economics)**, August 1992

Wayne State University, Detroit, Michigan, USA

**ACADEMIC EMPLOYMENT EXPERIENCE**

**Professor of Practice** January 2016 to present

**Course Director – Financial Management** May 2019 to present

*Michigan State University, Eli Broad College of Business, Department of Finance*

Courses taught: Financial Management, International Finance, Introduction to Finance, Computer Applications in Financial Modeling.

* Taught both small-sized classes and mass-lectures
* Redeveloped the curriculum for teaching introductory finance courses to non-business students
* Received student feedback scores well above the departmental average
* Created a new webpage to enhance communication between students and the department
* Created a new course selection guide to help students build their schedule based on their chosen career path
* Represented the Finance Department at the Alumni Distinguished Scholars workshop, which gives insights into the world of finance for prospective students and their parents
* Led an annual Study Abroad trip to St. Petersburg, Russia
* Hosted the 2018 Michigan China Business Forum event

**INDUSTRY EMPLOYMENT EXPERIENCE**

**Huntington Bank** Bloomfield Hills, Michigan, USA, October 2011 to December 2017

*Assistant Vice President – Investment Research Analyst*

Responsible for performing due diligence on all approved mutual funds and separate account managers, as well as preparing research reports for management and client-facing staff members. Also responsible for researching the entire mutual fund universe for potential additions to and/or replacements of funds on the approved list. In charge of coordinating the completion of all requests for proposals received by the PrivateBank. Co-author of the Educated Investor newsletter.

* Streamlined the retirement plan approved list to allow internal investment professionals to better serve retirement plan sponsors as well as make sure that the optimal share classes were being used for each approved fund.
* Created a new report for providing portfolio managers with client-ready talking points for all mutual funds in the asset allocation models. This report was also used by management on a quarterly basis to assess the continued use of the funds within the models.
* Supervised the creation of a knowledge database used for crafting responses to requests for proposal.
* Aided in the construction of new client presentation materials, as well as in the development of education and communication materials for the marketing department.

**Johnson Bank Wealth Management** Racine, Wisconsin, USA, October 2007 to October 2011

*Assistant Vice President - Investment Officer and Portfolio Manager*

Responsible for performing due diligence on all approved mutual fund holdings and separate account managers; maintaining the trust department’s approved list of assets as well as identifying possible additions; meeting with high net-worth clients; developing communication and client-education materials for the trust investment department; performing ongoing monitoring of client accounts to ensure they are in compliance with the investment policy from an asset allocation as well as approved holdings standpoint; developing and maintaining investment team policies and procedures.

* Developed a new fundamental analysis process to add to the department’s existing quantitative process to create a more complete due diligence methodology for mutual funds and separate account managers.
* Successfully integrated the approved asset lists of the bank with those of a registered investment advisor that had recently been purchased by the bank.
* Helped create new asset allocation models for advisory clients.
* Led a monthly investment conference call for trust department staff members.
* Managed the overhaul of the retirement plan services investment structure.
* Reorganized and improved the Trust Investment Policy Manual.

**Cymric Family Office Services** Costa Mesa, California, USA, November 2006 to October 2007

*Portfolio Manager/Investment Analyst*

Responsible for analyzing accounts of extremely high-net-worth clients, making changes to asset allocations as needed, and recommending securities for sale or purchase when appropriate. Also in charge of performing due diligence on client holdings as well as potential new investments in the hedge fund, private equity, separate account management, and mutual fund space.

* Created a new quarterly market and economy newsletter for clients.
* Streamlined and enhanced account review and client presentation format and procedures.

**Citizens Bank Wealth Management** Flint, Michigan, May2001 to Sept. 2005

*Equity Research Manager (Feb. 2004 to Sept. 2005)*

*Investment Analyst (May 2001 to Feb. 2004)*

In charge of: developing and implementing all individual equity strategy decisions; communicating strategy decisions to portfolio managers and other investment professionals; writing all equity marketing materials (for stocks as well as mutual funds); meeting with select customers to perform account reviews and deliver presentations on account recommendations; managing several high-net-worth portfolios; hosting the weekly departmental investment call.

**BOOKS PUBLISHED**

**Who Works for Who? Let Your Money Work for You**

*Pre-publication stage; estimated publication: May 2020*

A practical personal finance guide targeted toward university students and young adults. Teaches principles of finance and personal financial management in a light and humourous, but useful and understandable way.

**SKILLS**

* Proficient with the Microsoft Office suite
	+ Able to teach Excel Modeling at the university level
* Public Speaking experience to large groups
* Native English speaker; working knowledge of French; actively studying Russian