

Gary Vassalotti, LIFA, RTRP

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Education: B.S. in Finance with an emphasis in Economics granted on May, 1987, by The Pennsylvania State University, University Park Campus. Licensed International Financial Analyst (LIFA), CFA Level II Candidate.

Computer Skills: Applications: Lotus, MySql, Factset, Bloomberg, First Call, Compustat PC Plus, WordPerfect, Visual Dbase, Novell NetWare, Visual Basic, MS Office
Languages: Linux, Basic, Lotus Macro, Dbase, Visual Basic
Instructor for Lotus, DOS, WordPerfect, MS Office, Internet Usage, Advanced Email topics, and Scanning and Graphics software.

Work Experience: Vassalotti Investment Management Corp. (VIMCOR): April, 1996 to Present
Founded and run an investment advisory service. I provide Financial Planning, College Funding, Tax Return Preparation, and Portfolio Management services to individuals and businesses. Proprietary screens and investment methods have resulted in some portfolios experience returns in excess of 25% annually. Contract research services are provided to Investrend. Passed the Licensed International Financial Analyst exam, and the Registered Tax Return Prepaer exam.

V/S Technologies (www.vs-tech.com): January 1997 to Present

Formed a partnership to perform computer-related services with another individual. I perform Web Site design, custom programming, Custom programming (including software designed for customer contact management, a simple sales / invoicing program), System Configuration and Construction, and Software Instruction for our clients. VIMCOR uses software I developed in Visual Basic and Real Basic to perform portfolio management, investment valuation and tracking, and client contact functions. Data is stored on a networked MySql database. Investment services utilize proprietary models and valuations. Printer repair services by referral by local office supply store.

Pandya Computers, Ebensburg PA

Performed PC and laptop Repairs, assisted in network installations, and performed printer / terminal repairs under contract for the PA court system.

Montag Management Corp: July 1994 to August 1996

Equity Analyst/Portfolio Manager for small investment counselor. Responsibilities included designing and maintaining the Dbase code that generated the monthly buylist, designing and maintaining Lotus 123 spreadsheets for investment valuation, designing and maintaining forms used for report writing in WordPerfect, and maintaining the Compustat PC financial database.

First American/First Union: February 1990 to June 1994

Equity Analyst: February 1992 to June 1994

Responsibilities included assisting with rewriting and maintaining the Dbase code that generated the investment valuation/buy list (I was able to eliminate approximately 5 pages of unnecessary code). Informally continued to train co-workers in the use of WordPerfect, Dbase, Lotus, and some vendor databases.

First American Bank: February 1992 to June 1993

Equity Analyst/Portfolio Manager in the Investment department following the Automotive,

Capital Goods, Utilities, Telecommunications, Insurance, and Technology sectors. Geographic regions include the US, Canada, France, Spain, and Italy. Attended conferences on countries and industry sectors to increase my market knowledge. Responsible for finding, researching, and analyzing equity issues for addition to our buy list. The department managed over \$1.3 billion, with investments in foreign common, ADRs, and domestic equities.

Research Assistant: June 1991 to February 1992

Modified the trust LAN/WAN network to permit portfolio managers direct access to research reports, strategy committee notes, electronic copies of bulletins, performance numbers, and investment strategy committee recommendations.

Income Specialist: February 1990 to June 1991

Responsible for processing bond and CD interest, dividends, stock splits, GNMA payments, notes and mortgages. Wrote a Lotus based program that automatically generated processing tickets for GNMA payments, saving an estimated \$7,000/year, and received membership in the Winner's Circle 1990. Participated in the installation, maintenance, and training of personnel in the use of a LAN/WAN network.

Activities: The International Research Association, The CFA Institute, the North Carolina Society of Financial Analysts, Boy Scouts of America (Assistant Scout Master, Assistant Crew Advisor), NC Investment Advisors Association (Former Member of the board of directors, Secretary)

College: Finance Club, Camera Club (Secretary Junior year, President Senior year), Nominated for Presidents Award Senior year, Darkroom Club (President Sophomore year)