

# Forrest N. Fontana, CFA, PhD candidate

[forrestfontana@post.harvard.edu](mailto:forrestfontana@post.harvard.edu)

(781)-929-6490 text & call

## TEACHING, SERVICE, AND ADMINISTRATION

### **The Citadel Baker School of Business, The Military College of SC, Charleston, SC**

*Assistant Dean, Assessment,*

8/2024 – present

*Alvah H. Chapman, Jr. Chair in Management and Ethics*

8/2023 – present

*Professor of Practice, Department of Management & Entrepreneurship*

8/2023 – present

- Assistant Dean, Assessment, inclusive of all Assurance of Learning (AoL), and AACSB and SACSCOC accreditation activities for both graduate and undergraduate programs
- Professor of Practice, Business Analytics, Finance, and Ethics
- Director, Baker School of Business Coaching (Mentoring) Program, 8/2023 – present
- Chair, AoL Committee, 8/2024 – present
- Chair, Coaching Committee, 8/2023 – present
- Member, Strategic Planning Committee, 8/2025 – present
- Ex officio Member, Curriculum Committee, 8/2024 – present
- Faculty Lead, BSB Senior Leadership Day (Management & Marketing), 8/2023 – 5/2024
- Faculty Fellow, Center for Excellence and Innovation in Teaching, Learning and Distance Education (CEITL&DE), 8/2023 – 5/2024
- Member, Provost's Innovation in Instruction Technology Grant Committee, 8/2023 – 5/2024
- Advanced Online Teaching certificate (CEITL&DE)
- Academic Advising: 30 students per semester
- Course Evaluations: 4.7/5.0 avg., 4.9 high, 4.4 low, 16 F2F course sections, 404 student respondents
- Courses Taught: FINC403 Risk Management & Derivatives, BANA201 Applied Business Analytics, MGMT411 Business Ethics
- CY2024 Annual Faculty Performance review rating “*Exceptional*”

### **The Citadel Baker School of Business, The Military College of SC, Charleston, SC**

*Visiting Professor, Business Analytics*

8/2022 – 5/2023

- Instructed Citadel undergraduates in both Advanced and Introductory Business Analytics
- Academic Advising: 30 students per semester
- Course Evaluations: 4.7/5.0 avg., 4.9 high, 4.5 low, 8 F2F course sections, 202 student respondents
- Courses Taught: BANA101 Business Analytics
- CY2023 Annual Faculty Performance review rating “*Exceptional*”

### **The Citadel Baker School of Business, The Military College of SC, Charleston, SC**

*Visiting Professor, Economics*

8/2021 – 8/2022

- Instructed Citadel undergraduates in Microeconomics and Macroeconomics primarily in a face-to-face modality but also through synchronous & asynchronous online delivery utilizing Canvas as the Learning Management System
- Completed all Citadel Faculty Training requirements regarding Excellence and Innovation in Teaching, Learning & Distance Education
- Course Evaluations: 4.7/5.0 avg., 5.0 high, 4.2 low, 8 F2F and 2 ONL course sections, 178 student respondents
- Courses Taught: ECON201 Microeconomics, ECON202 Macroeconomics, ECON205 Survey Economics
- CY2022 Annual Faculty performance review rating “*Exceptional*”

### **College of Charleston Business School, Charleston, SC**

*Guest Instructor, MBA Advanced Corporate Finance*, with Dr. Daniel Huerta

Summer 2016

Instructed on Industry Analysis, Company Analysis, Fundamental Security Analysis, Valuation Methodologies, Capital Market complexities & dynamics, and Oral Presentation skills.

*Guest Evaluator, Undergraduate Corporate Finance*, with Dr. Weishen Wang

Spring 2016

Invited to assist in evaluating senior student final course project presentations on Corporate Financial Analysis and Oral Presentation skills.

*Guest Speaker, Finance Club*

Spring 2016

Invited to speak to the Finance Club on the areas of Fundamental Security Analysis, Valuation Methodologies, and Capital Market complexities & dynamics

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### EDUCATION: Degrees

**Kennesaw State University, Coles College of Business (AACSB), Kennesaw, GA**

***Doctor of Philosophy in Business Administration (PhD) candidate***

2025 – present

***Risk and Decision Analytics, Department of Economics, Finance, and Quantitative Analysis***

Research Interests: Decision Sciences applied to Empirical Asset Pricing, Alternative Investments, and M&A

Residence-based traditional research-focused PhD program, 48 credit hours, doctoral courses include:

- Decision and Risk Analysis
- Empirical Asset Pricing
- Advanced Econometrics
- Advanced Decision Analytics

**Harvard University, Kennedy School of Government, Cambridge, MA**

***Master of Public Administration (MPA)***

2012 – 2013

***Decision Sciences and Political Economy***

Elected Member, Harvard Graduate Council

Nominated: Robert F. Kennedy Award for Excellence in Public Service

Dean's Ambassador

Leader, OneHarvard program

Mentor, MC-MPA program

Op/Ed Writer, "The Citizen" student newspaper

**Columbia University, Graduate School of Business, NY, NY**

***Master of Business Administration (MBA), Finance & Accounting***

1991 – 1993

**Vanderbilt University, School of Engineering, Nashville, TN**

***Bachelor of Science (BS), Engineering Science and Management of Technology***

1983 – 1987

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### EDUCATION: Certificates

**CFA Institute, Charlottesville, VA**

***Chartered Financial Analyst***

1996 – Present

**CITI (Collaborative Institutional Training Initiative) Program for Institutional Review Board (IRB)**

***Social, Behavioral, & Educational Research with Human Subjects***

2025 – Present

**Massachusetts Institute of Technology, Professional Education, Cambridge, MA**

***Digital Transformation & Disrupting Technologies, remote asynchronous program, Certificate***

2021

- Blockchain technologies and Cryptocurrency
- Cloud, IoT, and Cyber Security
- Artificial Intelligence and Machine Learning

**Stanford University, Worldview, Stanford, CA**

***Behind and Beyond Big Data, one-week residence program, Certificate***

2016

- Behind and Beyond Big Data is an interdisciplinary program that brings together faculty and researchers from the domains of Social Science, Computer Science, Policy, Organizational Behavior, and Ethics.
- Participants study the drivers of Big Data & Data Analytics, including machine learning and algorithmic multi-factor modeling, the shifting of power and influence, and ways to create new value — all with the aim of better managing the tradeoffs among individuals, government, business, and society.

***Science of Decision-Making, one-week residence program, Certificate***

2015

- The Science of Decision Making is an interdisciplinary program that brings together faculty and researchers from the domains of Neuroscience, Behavioral Science, and Cognitive Psychology.
- Participants collaborate to understand and practice ways to model, influence, and make better decisions both as individuals and collectively in groups.

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### PROFESSIONAL EXPERIENCE

**NeuroEdge Investments, LLC**, Boston, MA, registered Investment Manager

**Founder, President, and Chief Investment Officer**

2015 – 2019

Investment management company focused on long/short equities in the essence of a true hedge fund. The operating model of NeuroEdge Investments is differentiated by:

- An investment style that has fundamental stock selection as the core basis for its selection of long and short equities, combined with an experienced and dynamic approach to the construction of hedged portfolios and risk management
- The integration of quantitative and technical tools to enhance returns and reduce risk
- A unique perspective that brings together top-tier analytical and portfolio management experience of more than two decades, with an added special "lens" from the domains of Behavioral Finance, Neuroscience, and ESG/SRI applied to the investment markets
- A business philosophy described as "Dynamic Investment Capital" -- helping institutions, families, and individuals "do good socially as they do good financially." NeuroEdge Investments approaches investment decisions in its hedge portfolios with a "consciousness" of ESG/SRI factors. The positive performance can produce a compounding effect on clients' investment capital, allowing them to effect greater change with their assets
- In contrast to traditional long/short fund models, a fee structure that more aligns the outcome of the investment manager with its clients' performance
- The synthesis of this process allows its clients to have a dynamic impact with their investment capital

**Fontana Capital, LLC**, Boston, MA, registered Investment Manager

**Founder, President, and Chief Investment Officer**

2005 – 2012

Investment management company focused on hedged portfolios for global endowments, foundations, pensions, family offices, and HNW individuals. At peak, managed \$400mm in assets focused on equity securities of global financial services companies, with an in-house staff of Research Analysts, Traders, Operations & Marketing professionals. Published performance track record for Fontana Capital Offshore Fund Ltd. from February 2005 (inception) thru March 2009 (close) delivered superior value-added absolute, relative, and risk-adjusted returns, net of fees:

- Annualized Return +10.10% vs. -24.85% for Benchmark
- Cumulative Return +46.83% vs. -70.36% for Benchmark
- Standard Deviation of 11.69% vs. 27.16% for Benchmark
- Historical Beta of -0.08 vs. Benchmark

**SAC Capital Advisors, LLC**, Stamford, CT

**Portfolio Manager**

2002 – 2004

Hedged Portfolio Manager for one of the largest global investment management companies focused on equity securities of global financial services companies.

**Fidelity Investments**, Boston, MA

**Portfolio Manager & Senior Equity Analyst**

2000 – 2001

Portfolio Manager & Senior Analyst for one of the largest global investment management companies focused on equity securities of global insurance companies.

**Putnam Investments**, Boston, MA

**Senior Vice President, Equity Portfolio Manager**

1998 – 2000

**Vice President, Equity Portfolio Manager**

1996 – 1997

**Vice President, Senior Equity Analyst**

1994 – 1995

**Equity Analyst**

1993 – 1994

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### EXECUTIVE, BOARD, AND PUBLIC SERVICE

**Streamable Learning**, Charleston, SC

*Special Advisor to the Co-Founders*

December 2014 – Present

Streamable Learning's mission is to help make live educational programming a valuable and common supplemental tool for teachers and homeschool families seeking to inspire and educate their K-12 students.  
[www.StreamableLearning.com](http://www.StreamableLearning.com)

**One80 Place**, Charleston, SC

*Volunteer*

November 2017 – Present

**Ronald McDonald House**, Charleston, SC

*Volunteer*

November 2022 – Present

**Pure Incubation**, Topsfield, MA

*Special Advisor to the Chairman & CEO*

June 2013 – December 2019

Pure Incubation offers B2B companies proven digital strategies, utilizing demand science applications and a flexible publishing platform to drive new revenue streams through demand generation solutions.

[www.PureIncubation.com](http://www.PureIncubation.com)

**American Red Cross**, Charleston, SC

*Disaster Action Team Associate*

2017 – 2018

**Mike Heffernan, Candidate for State Treasurer**, Commonwealth of Massachusetts

*Special Advisor to the Candidate*

January 2014 – November 2014

**Town of Winchester, MA**

*Chairman, Board of Selectmen*

April 2011 – March 2012

Led Executive Search for new Town Manager

*Vice-Chairman, Board of Selectmen*

April 2010 – March 2011

*Publicly-Elected Member (twice), Board of Selectmen*

April 2009 – March 2015

*Appointed Commissioner*, appointed to Commission of Trust Funds,

April 2015 – March 2018

*Publicly-Elected Town Meeting Voting Member*

April 2009 – March 2015

**Boston Common Coffee**, Boston, MA

*Co-Owner and Member, Board of Directors*

2008 – Present

**St. John's Preparatory School**, Danvers, MA

*Appointed Member, Board of Trustees*

July 2008 – June 2017

*Appointed Member, Nominating & Board Assessment Committee*

July 2014 – June 2015

*Appointed Member, Headmaster Oversight Committee*

July 2014 – June 2015

*Appointed Member, Investment Committee*

July 2010 – June 2017

*Appointed Member, Finance Committee*

July 2008 – June 2017

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### SKILLS and CERTIFICATIONS

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**CFA Institute, Chartered Financial Analyst**

1996 – Present

**CITI (Collaborative Institutional Training Initiative) Program for Institutional Review Board (IRB)**

*Social, Behavioral, & Educational Research with Human Subjects*

2025 – Present

**Statistical Software:** SPSS, Stata, and JMP

**Modeling Languages:** AMPL and PuLP (Python)

**Optimization Solvers:** CPLEX, Gurobi, and CBC

**Educational Tools:** CANVAS Learning Management System