

Forrest N. Fontana, CFA, PhD candidate

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

Forrest N. Fontana, CFA, PhD candidate

forrestfontana@post.harvard.edu

(781)-929-6490 text & call

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

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.

Forrest N. Fontana, CFA, PhD candidate

forrestfontana@post.harvard.edu

(781)-929-6490 text & call

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

Forrest N. Fontana, CFA, PhD candidate

forrestfontana@post.harvard.edu

(781)-929-6490 text & call

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

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

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

Forrest N. Fontana, CFA, PhD candidate

forrestfontana@post.harvard.edu

(781)-929-6490 text & call

SKILLS and CERTIFICATIONS

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