

MICHAEL R. BRACE, CFA

University at Buffalo School of Management
LINKEDIN.COM/IN/MICHAEL-BRACE-CFA-41580951

PHONE: 716.645.0182
EMAIL: mbrace@buffalo.edu

ACADEMIC EXPERIENCE

School of Management, University at Buffalo. *Buffalo, NY*

Clinical Assistant Professor of Finance
Director, MS Finance Program

August 2024 - Present

PROFESSIONAL EXPERIENCE

64 Northwest Partners, Ltd. *Hamilton, Bermuda*

Managing Partner & Portfolio Manager

June 2022 – July 2024

- Work closely with outside client advisors including tax and estate planning experts.
- Lead client relationship management, cash flow planning and portfolio management.
- Maintain referral source network for new business in the high-net-worth private client space.
- Manage due diligence and ongoing monitoring over portfolios of venture capital and private equity investments.

Consultant

July 2016 – June 2022

- Played key part-time role in starting the business with a focus on client relationships and portfolio management.

Courier Capital Corporation. *Buffalo, NY*

Senior Portfolio Manager

November 2016 – December 2022

- Provided asset management and advisory services to institutions, trusts and high net worth clients.
- Served as a trusted advisor and consultant to large institutional clients (hospitals, colleges, etc.).
- Coordinated the RFP process related to institutional investment management opportunities.
- Served as voting member of the firm's Investment Strategy and Research Committee.
- Managed recruitment and training process for several new employees and seasonal interns.

EFG Bank, EFG Wealth Management. *Grand Cayman/Bermuda*

Client Relationship Officer

July 2014 – July 2016

- Led all aspects of relationship management with institutional, family office and high net worth clients.
- Served as Outsourced Chief Investment Officer (OCIO) for several high-net-worth families.
- Implemented the full spectrum of complex portfolio structures, wealth management and private banking services.

Clarien Bank Limited (Wealth Management). *Hamilton, Bermuda*

Senior Advisor, Capital G Family Office

July 2011 – July 2014

- Delivered institutional investment management services tailored to meet the needs of complex portfolios.
- Led private banking and investment team to grow AUM and better serve clients.
- Local representative for a Toronto based private equity fund.
- Institutional focus on the Bermuda domiciled captive insurance company market.

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UBS Financial Services (formerly Key Private Bank division). *Williamsville, New York*

Portfolio Manager, Wealth Management Americas

September 2004 – May 2011

- Delivered global wealth management capabilities to private clients and trusts.
- Served as a voting member of the Core Equity Team and Investment Strategy Committee.

Elias Asset Management (division of Community Bank System, Inc.). *Williamsville, New York*

Portfolio Manager

February 2000 – February 2003

- Oversaw management of the pension plan assets for parent company, Community Bank System, Inc.
- Served as a voting member of the Investment Policy Committee responsible for determining investment strategy.
- Instrumental in expanding relationships in Florida and in developing new relationships in the Chicago market.

Daemen College/Jamestown Community College. *Amherst, New York*

Adjunct Faculty, Finance & Investments

December 2007 – May 2009

Jamestown Community College. *Jamestown, New York*

Adjunct Faculty, Macroeconomics

December 2003 – May 2005

National Bank of Canada. *Buffalo, New York*

Marketing Officer – U.S. Commercial Banking

December 1996 - February 2000

Fleet Bank of New York. *Buffalo, New York*

Financial Analyst - Corporate Banking

August 1994 – December 1996

EDUCATION AND DESIGNATIONS

Chartered Financial Analyst (CFA) designation - October 1998

Master of Business Administration (MBA) - 1994

State University of New York at Buffalo

Corporate Finance and Financial Institutions

Bachelor of Science - 1992

State University College at Geneseo Management Science – Finance

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COMMUNITY INVOLVEMENT

- ◆Bermuda Community Foundation - Director & Investment Committee Chair (2012-2023)
- ◆The Nature Conservancy of Central & Western NY - Trustee (2010 - 2011, 2016-2022)
- ◆University at Buffalo - Guest Lecturer, Career Development Classes (January 2001-2021)
- ◆CFA Institute - Member (1998-present); President CFA Society of Buffalo (2000-2001)
- ◆Rotary Club Hamilton (Bermuda) - Member & Director (2014–2016)
- ◆Niagara Frontier Search and Rescue Team (2020–2022)
- ◆University at Buffalo School of Management Alumni Association - Director (1998-2011), President (2000-2002)
- ◆University of Buffalo School of Management - Deans Advisory Council Member (2000-2002)
- ◆Community Foundation for Greater Buffalo 21st Century Fund – Grant Committee Member (2008-2010)