

# Secure

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## Area of Expertise:

- Damage Analysis and Interpretation

## Relevant Experience/Training:

- Damages Expert testifying on internal process, procedures and interpretation of all product reports for FINRA and NYSE arbitrations. Ongoing
- Successfully completed SFS Securities Damages curriculum 2008

## Qualifications:

- Account theory
- Concentration analysis
- Commission analysis
- Comprehending Profit & Loss work products
  - Data origination
  - Calculation and formulas used in securities analysis preparation
  - Data interpretation, presentation and techniques
  - Uncovering trading patterns and trends
- Program capabilities
- Report customization
- Positioning supplemental reports for arbitration
- Monthly statement analysis
- Proficient in Bloomberg Terminal
- Fluency in *Portfolio Perspective Analyst*<sup>™</sup>