

Secure

financial services, inc

ANALYSIS DIVISION
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Steve McDonald

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Professional Overview:

Steve has well over 10 years of experience in securities related analytics. He initially joined Secure Financial Services, Inc., in August 2001. He started out as an Investment Analyst learning the ins and outs of the Portfolio Perspective™ software. Over the years he has been grown to the Senior Analyst position. He has trained numerous analysts in the proprietary software. Steve has significant experience in managing and coordinating projects and developing unique solutions to financial and legal clients, including scheduling, costing, planning, prioritizing, and risk assessment. Steve's vast knowledge of investment analysis and expert witness consulting and testimony demonstrates his ability to serve as the conduit for all contract deliverables and as liaison to UBS.

Education:

- Rensselaer Polytechnic Institute May, 1998
Computer Science / Philosophy

Relevant Experience/Training:

- Damages Expert testifying on internal process, procedures and interpretation of all product reports for FINRA and NYSE arbitrations. Ongoing
- Completion of SFS Annual Security Awareness Training 2017
- Presenter/Trainer at the SFS User Conference in New York City 2004
- Successfully completed SFS Securities Damages curriculum 2001

Expert Testimony provided in the following cases:

- Cassell / Zucherman v. First Union
- Giordano v. SG Cowen
- Giordano v. Amer. Wealth Mgmt
- Mukaty v. Goldman Sachs
- McCarthy v. Asset Mgmt Secs Corp
- Vigorito v. UBS Financial Services Inc.
- Blain v. Linsco / Private Ledger

Qualifications:

- 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
- Report customization
- Monthly statement analysis
- Proficient in Bloomberg Terminal