

KURTIS S. PLUMER, CFA

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SENIOR PORTFOLIO MANAGER/LEVERAGED FINANCE EXECUTIVE Credit Portfolio Management/Distressed Investing/Restructuring and Workout

Top-performing executive with over 30 years of experience in leveraged finance and capital markets. Expertise in managing investments in leveraged loans, high yield bonds, stressed and distressed debt, structured products and equities. Outstanding leader and demonstrated team player with exceptional investment performance. Excellent analytical, organizational, team-building and communication skills. Chartered Financial Analyst.

PROFESSIONAL EXPERIENCE

BAYLOR UNIVERSITY, Waco, TX

Present

Adjunct Professor

- Instructor for Finance 4365, *Investment Analysis*

WHITESTAR ASSET MANAGEMENT, Dallas, TX

WhiteStar Asset Management is a credit-focused investment management firm with \$14bn in AUM

Managing Director/Head of Restructuring and Workout

- Member of Investment Committee that approved all investments
- Actively managed investments in leveraged loans and high yield bonds for the media & cable industries
- Secondary investment responsibility for building materials, retail, consumer and food & beverage industries
- Directed all restructuring and distressed activities
- Responsible for a team of 3 analysts
- Actively traded leveraged loans and high yield bonds with 20+ counterparties

COMMERCE STREET INVESTMENT MANAGEMENT, Dallas, TX

Boutique Asset Manager focused on financial services companies

Managing Director & Portfolio Manager

- Managed two private equity funds invested in bank-related structured products
- Worked with investment committee to approve each new investment and monitor and prune existing investments
- Worked with institutional investors, internal marketing, third party placement agents and fund advisors to develop new products to meet investor needs
- Maintained relationships with existing investors and handled all inquiries

HIGHLAND CAPITAL MANAGEMENT, Dallas, TX

Registered Investment Advisor of \$18 billion in below-investment grade assets under management

Partner, 2003-2009

Portfolio Manager, 1999-2003

- Member of Highland's 5-person credit committee that approved every investment
- Actively managed a \$3 billion portfolio invested in leveraged loans, high yield bonds, distressed debt and equities
- Launched 3 multi-strategy credit hedge funds, ultimately managing more than \$7bn in assets
- Helped raise over \$2 billion in investor capital between 2005 and 2007
- Significant restructuring experience developed in over 75 bankruptcy/workout situations
- Served on the Board of Directors of two companies

LEHMAN BROTHERS, New York, NY

High Yield/Distressed Trader

- Traded par and distressed corporate bonds, primarily from Latin America and Asia. Analyzed companies in numerous industries, with particular focus on media/telecom, energy, and utility/project finance
- Managed a \$250 million portfolio, including customer flow and proprietary positions
- Worked closely with high yield and distressed research analysts to identify and profit from relative value opportunities

BANC OF AMERICA SECURITIES, Dallas, TX

Mergers and Acquisitions Associate

EDUCATION

KELLOGG SCHOOL OF MANAGEMENT

NORTHWESTERN UNIVERSITY, Evanston, IL

Master of Business Administration with majors in Finance and Strategy

- *Austin Scholar* - Selected to be one of 19 students (out of 4,800 applicants) awarded a scholarship based on academic ability and leadership potential. Only merit-based scholarship offered by the school

BAYLOR UNIVERSITY, Waco, TX

Bachelor of Business Administration with majors in Economics and Finance – Magna Cum Laude graduate

- Named Baylor's Outstanding Economics Student; Dean's List; Beta Gamma Sigma National Honor Society; Presidential Scholar

OTHER

Completed CFA program in the minimum three years required. Enjoy biking, hunting and golf.