

Norman Rothery, Ph.D., CFA

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Highlights

- ▶ Physics Ph.D.
- ▶ Chartered Financial Analyst
- ▶ 13 years of investment experience
- ▶ Award-winning columnist
- ▶ 17 years programming
- ▶ 6 years teaching

Investment Experience

Chief Investment Strategist for Dan Hallett & Associates, 2006-2007

- ▶ Investment research and financial consulting.

Financial Consultant for Dan Hallett & Associates, 2004-2006

- ▶ Investment research and financial consulting.

Chief Technology Officer for FundMonitor.com, 2000

- ▶ Managed a team of four web developers under tight conditions.
- ▶ Responsible for the firm's equity research.

Chief Investment Strategist for FundMonitor.com, 1999

- ▶ Designed and produced software to analyse and make daily recommendations on over 8,000 U.S. and Canadian stocks.

Contributing Editor for Canadian MoneySaver, 1999-2007

Award-winning columnist for MoneySense, 2004-2007

Founder of StingyInvestor.com, 1995-2007

- ▶ Responsible for all aspects of this popular website that caters to well over 10,000 investors each week.

Business Experience

Training & Advanced Technical Support for Elections Ontario, 2003

- ▶ Responsible for the development and delivery of custom software training for over 200 satellite office staff.
- ▶ Provided advanced technical support to 103 electoral districts.
- ▶ Helped to manage a team of 12 technical support staff.

Automation Coordinator for Elections Canada, 2000

- ▶ Responsible for the district's software, hardware and related staff.

Director of Excalibur Publications, 1997-1998

- ▶ Advised the management of York University's largest newspaper.

Computer Experience

- ▶ 17 years programming in a variety of languages: Perl (9yrs), HTML (10yrs), Visual Basic (1yr), SQL (1yr), Java Script (2yrs), Java (1yr), FORTRAN (8yrs), C/C++ (2yrs), Pascal (5yrs), and Maple (2yrs).
- ▶ 6 years coding complex physical models and developing interfaces for computer controlled devices.
- ▶ System administrator 1992-98 (DOS, Windows, and Linux based PCs).
- ▶ Web developer (Stingy Investor, Friends of Public Education, York University Physics Department, and York University Faculty of Science).
- ▶ Web consultant (FundMonitor.com, ADBASE, RM Trust)
- ▶ Windows98/NT/XP, Solaris, Linux, and MS Office familiarity.

Education

Chartered Financial Analyst

CFA Institute, awarded in 2004 and a current charter holder

Ph.D. in High Precision Atomic Physics

York University, 1992-98

Honours in both the Canadian Securities Course and the C.P.H. exam

Canadian Securities Institute, 1996-97

First Class Honours B.Sc. in Physics and Applied Mathematics

York University, 1988-92

Research Experience

Research Assistant in a High Precision Atomic Physics Group, 1992-98

Prof. Eric Hessels, Physics and Astronomy Dept., York University

- ▶ Completed a thesis entitled "A High Precision Measurement of the 2S Atomic Hydrogen Hyperfine Interval".
- ▶ Observed, analysed, and reduced complex data sets. Numerical methods used included Monte Carlo simulation, non-linear least squares fitting, and numerical solutions of 2nd order PDEs.
- ▶ Instrumental in the group's laboratory startup (a \$500,000 operation).
- ▶ Spoke and made presentations at national and international conferences.

Research Assistant in a Particle Physics Group, June-August 1991

Prof. Bob Orr, Physics Department, University of Toronto

- ▶ Monte Carlo based particle detector modelling in C.

Teaching Experience

- ▶ 6 years of undergraduate laboratory demonstration and teaching.
- ▶ 2 years instructing new teaching assistants on educational techniques.
- ▶ Developed and delivered custom software training for Elections Ontario.

Other Experience

- ▶ Contributed to five popular investment books.
- ▶ President of the York University Physics Graduate Executive
- ▶ President of the York University Physics club.
- ▶ President and Vice President of the York University Astronomy club.
- ▶ Awarded over 20 academic prizes and awards.
- ▶ Long distance hiking and bicycling enthusiast.

References available on request.