

MARCO I. BONELLI, PHD

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ACADEMICS, CONSULTANCY, ADVISORY, FINANCIAL & STRATEGIC ANALYSIS

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† LECTURING & RESEARCH † FINANCIAL & SECURITIES ANALYSIS † KEYNOTE SPEAKER

Leverages subject-matter expertise and extensive market experience to generate learning opportunities that bridge the gap between theory and practice. Specialties include:

- ❖ **Revitalizing corporate image:** Revamped brand at *IFS Securities* from small advisors' retail network to a full-service firm.
- ❖ **Leading growth initiatives:** Ranked as the highest revenue producer at *CL King* by achieving average yearly commission production rate of \$1M+ and contributing to 25% of total revenue by nurturing and securing large institutional clients. In any firm joined, always ranked # one producer.
- ❖ **Fostering a healthy network of internal and external customers:** Nurtured 60% Nasdaq institutional market share in Italy for *Cowen & Co* by leading team to recruit institutional investors for emerging sectors. Tackled lack of confidence in NASDAQ, introduced major tech industry players for the first time in the Italian market, **and established offices in London, Milan and Lugano.**

EDUCATION

Alliant Intl University- School of Management- San Diego, CA **PhD – Strategic Management** 2012 - 2017

Proposed and defended Dissertation: "Leadership within Modern Strategic Management: Measuring Corporate Equity Value, using Igor Ansoff's Strategic Posture Analysis".

USIU - San Diego, CA - **MBA Concentrations in: Finance & Strategic Management** 1985 - 1986

Attended 3 classes with Prof. Ansoff which were key in entering and successfully grow in a highly competitive Wall Street Job Market

UCLA – Anderson School of Management- Los Angeles MBA courses in finance and accounting 1985

University of Venice, Venice - Venezia, Italy **Laurea Degree – Business Administration** 1979 - 1983

Concentrations of Faculty Study Plan were in Banking & Law

Thesis: "Financial Leasing Activities as a Security Investment"

Liceo Classico G. Carducci, Bolzano-Bozen, Italy **Maturita' Classica –High School** 1973-1979

LECTURING

Westminster International University Tashkent, Uzbekistan - **Senior Lecturer (S3)**

Department of Finance

September 2020 to Current

Fort Hays State University, Kansas. US – **Associate Professor**

"Strategic Management, Management Principles, Principles of Investment – Entirely designed, developed and thought face to face and on-line courses for about 900 (a semester) Chinese Sophomore Students during COVID-19 August 2019 to August 2021

Sias University, Henan, PR China - **Visiting Professor Finance, Strategic Management**

August 2019 to August 2021

SP Jain School of Global Management, Dubai, Mumbai, Sidney, Singapore– **Visiting Professor International Finance (2 MBA batches) – Economics (BBA) – Business Economics (MBA)-**

Faculty highest score in 3 batches (out of 4) of Students' Feedback

August 2018 to January 2019

Hefei University of Technology, Hefei, Anhui, PR China - **Clark University, US Visiting Professor**

Entirely designed and conducted 2 semesters undergraduate modules to 2nd year undergraduate students in **World's Economies and Cross Management**.
March to July 2018

Modern College of Business & Science – Muscat, Sultanate of Oman – **Franklin University Distinguished Visiting Scholar- Investment Financial**

JiangXi University of Traditional Chinese Medicine – Nanchang, JangXi, PR China – **Adjunct Faculty**

in cooperation with University of Bolton, UK

Teaching 4th year undergraduate students' course- "**Advanced Research Methodologies**"
December 2017 to January 2018

Anhui Business College- Wuhu, Anhui – **Short Term Adjunct Faculty**

Teaching 2nd year undergraduate students' course "**Cost Accounting**"
December 2017

Bangor University – Changsha, Hunan, PR China - **Senior Lecturer**

Full time 4th year undergraduate students. Professor in Banking and Finance (delivered classes in Comparative Banking, will deliver in "Investment Banking", "Investment Portfolio Theory and Risk Management" – will design and teach to 2nd year students' module in "Principles of Strategic Management"
February to September 2017

Zhejiang University of Finance and Economics, Hangzhou, PR China - **Adjunct Faculty**

Entirely designed and conducted 3 weeks undergraduate modules to 3rd year undergraduate students in **Banking and Finance**.

November to December 2016

Siam University – Bangkok, Thailand - **Visiting Faculty – MBA**

In charge of organizing a cycle of practical skills seminars including:

Investing Banking Principles, Securities (Equity) Analysis, Securities (Equity) Portfolio Selection, Efficient Frontier (according to the criteria of risk and reward), Securities (Equity) Trading Strategies (practical simulations), Careers in the financial services industry
July to August 2016

SP Jain Business School – Singapore - **Visiting Faculty – MBA Program**

Held workshops on "Wall Street Job Opportunities for MBA graduate Students

June 2016

PROFESSIONAL EXPERIENCE

Chief Investment Officer at *Strategic Posture at Strategic Posture Consulting Group* - San Diego, CA

2015 to 2017

I was part of a new knowledge firm, a strategic management think tank and thought leader in turbulent business environment. We apply knowledge, experience, expertise, imagination and will solve strategic problems. We customize methods that are based on digging in depth until the cause is clear and the desired effect is within grasp. We contribute to plan and implement for growth and profit in turbulent business environment.

Senior Managing Director & Head of Research at *IFS Securities* | Atlanta, GA

Formed and led a high-powered team of 10 analysts to cover 120 companies within a 4-month

2012-2015

period. Revamped network of mom-n-pop retail financial advisors into a full-service firm. Developed inside market knowledge and formed mutually beneficial relationships with a special emphasis on firms in the healthcare, energy, and technology industries.

- ♦ Secured \$6M in revenue within the first year, with projected earnings of \$10M next year by securing institutional clients by Establishing new firm image, improving quality and availability of services, and harnessing capital market knowledge.
- ♦ Secured 80% in report development costs by revisiting internal processes to incorporate new reporting methods and forming a dedicated of analysts to focus solely on financial reports, improving service delivery and customer relations.

- ♦ **Revolutionized** company culture to incorporate high-level research, link between various departments to improve service offering, and trigger other departments to upgrade internal processes, improving efficiency and boosting revenue.

Director – International Research Distribution at *CL King* | New York, NY, 2010-2012

Brought on board to revitalize business by launching international distributing network; formed mutually beneficial relationships with Wall Street Economists, Strategists, and Equity Analysts. Hired and trained junior salesmen. Transformed operations for niche firm to become a leading international player.

- ♦ Managed a \$10M portfolio through value-oriented approach, maintaining competitive positioning through regular research and analysis of general market reports on Mid and Small Cap Value Stocks.

Managing Director at *Northeast Securities* | New York, NY, 2009-2010

Turned entire business around, managed day to day financial advisory process, launched equity research platform, and supervised team, concurrently managing existing market strategy. Met challenge by conducting extensive financial analysis, portfolio management, and stock valuations, and by forming a high-powered team within the firm. Delivered self-generated services to domestic and international clients.

- ♦ Earned \$700K in revenue by performing dual duties as an analyst and salesperson; gained and exploited vital industry knowledge to support the other role and provide clients with custom-made products and services.
- ♦ Streamlined delivery process by jointly developed “M-Squared” proprietary equity portfolio management model.
- ♦ Supervised associates; implemented improved operational practices and established policies with clear procedures.

Principal & Managing Director at *Raymond James International* | London, UK, 1997-2008

Independently and proactively managed independent branch, supervising all aspects of P&L management and market research and leading a team of 8 international associates located in the US, Italy, Switzerland, and the UK. Entrusted to sign high-profile clients and provide personalized, superior customer service that enhanced service levels and set a new bar for facilitation in the financial industry.

- ♦ **Drove** a yearly average of \$5M in sales in previously uncharted territories; established a presence in Italy and Switzerland by leveraging personal contacts and reputation; delivered an enhanced level of service that gave us a competitive edge.
- ♦ Recognized for consistently exceeding expectations with “Best international Producer Award” (6 times) and “Best Overall Producer Award” (3 times).
- ♦ *Raymond James* was ranked in the top six brokers in Italy during tenure.

Director at *Cowen & Co* | New York, NY, 1991-1997

Appointed as a Junior Partner; quickly advanced through the ranks by achieving significant growth in revenue, utilizing operational management skills to increase portfolio, and employing exceptional interpersonal skills to gain clients for sophisticated products in technology and healthcare sectors. Made a mark on operations by ensuring unmatched returns and maintaining exceptional service standards.

- ♦ Took initiative to promote investment in then unknown and mostly volatile high technology ventures by conducting detailed sessions for clients, organizing trips to tech companies, and **establishing** firm as an international leader for technology investments in firms such as Microsoft, Cisco, Novell, 3com, Amgen etc
- ♦ Positioned the Italian market as the most profitable for the firm, recognized for this role as “Top Broker Dealer”.
- ♦ 3-time winner of Best Producer Award; 2-time winner of Best of Best Overall Producers Award
- ♦ *Cowen & Co* was ranked #1 broker share in Italy and held 60% of the market share during tenure.

CERTIFICATIONS

- ♦ FINRA Series 7 AND 63 General Representative
- ♦ FINRA Series 24 Principal
- ♦ FINRA Series 86 AND 87 Registered Analyst
- ♦ TEFL certificate with Business English Specialization

BIO

- ♦ **Polyglot:** Speaks Spanish, Italian, and English fluently. Proficient in German, Portuguese, French, Elementary knowledge of Thai and Mandarin
- ♦ **Citizenship:** Dual American and Italian Citizen – Foreign Expert residency permit in the People Republic of China
- ♦ **Entrepreneur:** Sarto Cycles US, founded in 2009 and developed from scratch a multi-million import business of high-end and hand-made, customized bicycles to the US
- ♦ **Athlete:** Competed in over 70 Ironman Triathlon Competitions, including Ironman Hawaii World Championship (4 times), Master Martial Artist (Muay Thai), and World Champion Contender Master Boxing (Las Vegas, Dec. 13-15, 2020)

PUBLICATIONS

- ♦ Keynote Speaker at DECA 2021 (Digital Economy and Computer Application) - *Pro & Cons of the Digital Yuan* Sept 24-26, 2021, Shanghai China.
- ♦ Committee Member of 4th International Seminar on Management and Social Sciences – July 17-19 Dali, China
- ♦ Presenter at Asia Pacific Conference on Economics and Finance (APEF 2020) – 23-24 July Furama, Singapore
- ♦ Keynote Speaker at 2020 2nd International Conference on Economic Management and Cultural Industry (ICEMCI 2020) will be held in Kitakyushu, Japan on October 23-25, 2020 <https://use.vg/FHXDm6>
- ♦ Presenter at the Strategic Management Society Special Conference Dec. 10-12 in Hangzhou, China.
- ♦ In the process of submitting paper “*The impact on COVID-19 on Global Stock Markets*” to the “*Journal of International Financial Markets Institution and Money*” (Top 20 Academic Journal in Finance).
- ♦ *Equity Valuation Using Ansoff’s Strategic Posture Analysis* - Scholars’ Press – March 2018
- ♦ *A Review of the Upper Echelon Theory and Subsequent Refinement* – Academia.edu uploaded 10/11/2014, 1,526 all-time Views.
- ♦ *The Internet of Everything – IFS Securities Sector Investment Report* – Academia.edu November 2014
- ♦ *The Optimal Strategic Performance Positioning (OSPP) Matrix as an Evaluative Tool for Stock Analysts* - Uploaded 11/2013 2,306 all-time views as of 11/5/2017
- ♦ *What kind of asset is bitcoin? An answer from the Stock Market.* ISEMS 2020 (accepted paper, in the process of being indexed)
- ♦ *Analogies between Internet and Blockchains: Hype Cycles, and Securities Trading Patterns* ICEMCI 20201 (accepted paper, in the process of being indexed)
- ♦ *Can intuition be measured? Measuring Traders’ intuitive skills on a unpredictable guessing game*, submitted to *Journal of Economic Psychology*
- ♦ *The Relationship Between Multi-Nationality and Performance in US Large Capitalization Multinational Companies* submitted to *Global Strategy Journal* – Special Paper call on “*MNCs and complexity*”.

REFERENCES

Matthew D. Schenk, Dean of Kansas International Institute at SIAS University, **Xinzheng Henan**, (MattDSchenk@icloud.com),

Babu George, PhD Associate Dean and Professor, Director of MBA Program, School of Business, Christian Brothers University, Memphis, Tennessee (BPGeorge@cbu.edu)

Nicholas Hamelin, PhD, Associate Prof. of Marketing, Neuro-Science lab Director, at SP Jain School of Global Management, Dubai. Mumbai, Singapore & Sydney (Nicholas.Hamelin@SPJain.edu.au)