

PATRICK K. LOTZER

OBJECTIVE

Registered Investment Advisor

EXPERIENCE

1993–Present Lotzer & Co., Inc. Milwaukee, WI

Founder and President

- Founded the company by raising over \$150,000 from 12 other owners.
- Currently managing over 100 accounts for more than 60 clients averaging about \$150,000 per account.
- Responsible for investment research and management of accounts.

1991–1994 Marsh & McLennan, Inc. New York, NY

Senior Financial Analyst

- Responsible for forecasting, budgeting of departments with expenses of more than \$140 million.
- Specialty was creation of spreadsheets for “What-if” scenario analysis.
- Responsible for training Junior Analysts in financial modeling.

1989–1991 Marsh & McLennan, Inc. New York, NY

Junior Financial Analyst

- Analyst for 18 offices in the Southeast and Central United States.
- Developed new methods of improving analysis of offices.

EDUCATION

1984–1988 University of Cincinnati Cincinnati, OH

- B.B.A., Finance and Business Management.
- Graduated in December 1988.

1991–1994 Baruch College, City University of NY New York, NY

- MBA Program, International Finance

INTERESTS

Golf, Windsurfing and Weightlifting

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