

## **RYAN A. HUGHES**

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(619) 618-2423

## **EXPERIENCE**

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### **BULL OAK CAPITAL, LLC**

San Diego, CA – 2014 to present

#### ***Founder / Chief Investment Officer***

*Bull Oak Capital is a fiduciary financial advisory firm (RIA) registered with the state of CA*

- An independent financial advisory firm that provides financial planning and investment management services for HNW individuals
- The firm's investment strategy was created during a UCLA graduate research project under the direction of Dr. Hanno Lustig and Dr. Jason Hsu
- A smarter investment strategy that focuses on low costs (min. fees, transactions, etc.) and asset class risk allocation

### **CHARLES SCHWAB & CO**

Los Angeles, CA – 2010 to 2012

#### ***Vice President, Financial Consultant***

- Managed over \$300MM in assets for 300 affluent clients
- Circle of Excellence recipient for performing at the highest levels in client service and productivity
- Selected to join a veteran division as the youngest Financial Consultant in the SoCal region

### **MORGAN STANLEY & CO**

Los Angeles, CA – 2008 to 2010

#### ***Financial Advisor***

- Prospected, developed, and managed a practice of HNW clients (individuals, families, business owners, and retirees) during the market turmoil of 2008
- Co-developed a formal office training program for new Associates where I conducted a course which resulted in a higher retention rate (40%) vs. the national average (10%)

### **MERRILL LYNCH & CO**

Beverly Hills, CA – 2007 to 2008

#### ***Financial Advisor / Junior Partner***

- Selected for the elite HF Group as a result of outstanding performance as an intern
- Created and implemented a marketing strategy that ultimately resulted in \$8MM in new assets

### **UNITED STATES NAVY**

San Diego, CA – 2000 to 2004

#### ***Second Class Petty Officer, VBSS Team Member***

- Recipient of the Letter of Appreciation for the safe transfer of 15 alleged Al-Qaeda detainees and confiscation of 2800 pounds of contraband from a VBSS boarding
- Boarded over 50 vessels in the Middle East as a member of the VBSS (Visit, Board, Search, and Seizure) Team
- Completed the Enlisted Surface Warfare Specialist (ESWS) qualification in 6 months, 8 months sooner than any other sailor in the ship's history

## **EDUCATION**

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### **UCLA ANDERSON SCHOOL OF MANAGEMENT**

Los Angeles, CA – 2014

#### ***M.B.A., Investment Management***

- J. Fred Weston Award Winner (Academic Excellence in Finance)
- Global Access Program Fellow (academic distinction given to top 6% of MBA thesis participants)
- Anderson Student Asset Management (ASAM) Chief Investment Officer (Class of 2013)

### **UNIVERSITY OF SOUTHERN CALIFORNIA**

Los Angeles, CA – 2007

#### ***B.S., Business Administration***

- Dean's List (2005 and 2006) and recipient of the Schoen Family Scholarship (2006 and 2007)
- Awarded a Top-10 Business Plan at USC for the upstart venture Abbey Songs Publishing
- Recipient of the Lloyd Greif Entrepreneur Networking Award (2007)