

# LISA ZÚÑIGA RAMIREZ, CFA

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## **OVERVIEW**

Proven corporate leader, board director and financial expert with significant investing, corporate strategy and ESG experience. Attained Equity Partner at a privately owned money management firm due to value creation thru investment outperformance and significant growth in AUM.

Exceptional communication and interpersonal skills used to effectively communicate investment strategies and results to Board of Directors and other clients.

## **SELECT ACCOMPLISHMENTS**

- Generated a five-year track record of growth equity outperformance.
- Co-led a value investing team to a 19-year track record of outperformance.
- Instrumental in the growth of the Small Cap Value Dividend Strategy from \$100m to \$2.3b AUM.
- Pursued and won the first Diversity & Inclusion investment mandate for the firm.
- Founder and Chairperson of the SBH Diversity & Inclusion Committee.
- Selected for the NYSE Board Advisory Council Network, a CEO-vetted, diverse candidate network.
- Chosen for 2021 Cohort of Boardbound by Women's Leadership Foundation.

## **EMPLOYMENT HISTORY**

### **Segall Bryant & Hamill (acquired Denver Investments LLC in 2018)**

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|--|-----------|
| • Principal, Senior Portfolio Manager - SBH            | 1989-2020 |
| • Partner, Senior Portfolio Manager                    | 2018-2020 |
| • Partner, Senior Equity Analyst                       | 2009-2018 |
| • Equity Analyst                                       | 2002-2009 |
| • Marketing Specialist                                 | 1997-2002 |
| • Portfolio Administrator                              | 1995-1997 |
| • Human Resources Specialist & INROADS Minority Intern | 1992-1995 |
|  | 1989-1992 |

## **CURRENT BOARDS AND ASSOCIATIONS**

- Independent Director – Bow River Capital Advisory Board
- Treasurer, Executive Committee, Audit Committee – The Denver Foundation
- Board Director – Denver Employees Retirement Plan (DERP)
- Board Director –Latinas First Foundation
- Board Director – Vuela for Health
- Corporate Board Candidate – NYSE Board Advisory Council Network
- Executive Member – Latino Corporate Directors Association

## **AWARDS AND ACHIEVEMENTS**

- Girl Scouts of Colorado Woman of Distinction 2018
- Denver Hispanic Chamber of Commerce Businesswoman of the Year 2016
- Latinas First Foundation Unsung Heroine 2016
- Speaker on topics of Equity Investing, Careers in Finance, ESG and Diversity, Equity & Inclusion

## **EDUCATION**

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|---|------|
| • CFA, The Institute of Chartered Financial Analysts          | 1997 |
| • MBA, Regis University, Denver, Colorado, Magna Cum Laude    | 1993 |
| • BSBA, University of Colorado at Denver, Colorado, Cum Laude | 1991 |