

Clint Calhoun

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Profile	<p>Experienced professional with a background in management, software development, process improvement, financial oversight, and statistical analytics. Equipped to grasp the business operation as a whole while delving into complex details to identify inefficiencies and solve problems. Draws on broad expertise and varied experience to drive outside-the-box innovation and growth. Excels in independent decision-making, fostering relationships with stakeholders, and driving transparency in complex environments. Utilizes deep understanding of the full tech stack to evaluate system design options that simplify processes, improve robustness, and reduce ongoing maintenance costs.</p>
Education	<p>Harvard Law School, Cambridge Massachusetts Juris Doctor, 2009</p> <p>Southwestern University, Georgetown Texas Bachelor of Arts summa cum laude, 2006 Major: Philosophy, Minor: Computer Science</p>
Certifications and Skills	<p>Licensed Attorney State of Texas, 2009 – Present</p> <p>Registered Investment Advisor Series 65, 2016 – Present</p> <p>Development and Operations</p> <ul style="list-style-type: none">• Python/Pandas, JavaScript, HTML/CSS, Ruby, Java, SQL, Linux, GitHub• Maintain critical tech infrastructure: security, backup, failure resolutions
Projects	<p>High-performance Trading Simulation Engine</p> <ul style="list-style-type: none">• Developed an engine that simulates executing custom stock trading algorithms over 26 years of weekly trading in only 715ms. The commercial third-party subscription product requires 2-5 minutes to compute similar results.• Optimized the data format to maximize throughput• Profiled and refined performance critical code• Extensive reporting of simulation results to enable comparison and analysis <p>Headless ETL and Iterable API</p> <ul style="list-style-type: none">• Used custom requests and parsing to ETL data from a JavaScript heavy source without requiring a browser in order to maximize resource utilization while minimizing load on third party• Wrapped the ETL operation in an iterable API that transparently implements concurrency, caching, rate limiting, and load balancing fan out across multiple accounts• Ad hoc migrations and optimized indexing of 50GB+ SQL databases• Data quality checks and detailed logging revealed and facilitated resolving multiple errors in provider's point-in-time database <p>Customized Machine Learning and Statistical Analysis</p> <ul style="list-style-type: none">• Applied custom stochastic gradient descent algorithm to conform to functional domain constraints while weighting thousands of potential factors• Multiprocessing test harness and extensive reporting to evaluate the in-sample and out-of-sample performance of competing methods of model construction• Invented novel metric inspired by M2 Sharpe for annualized risk-adjusted

- returns that accounts for the log-normality of returns and loss aversion
- Evaluate or invent KPIs and measure correlation to subsequent returns

Automated Order Management for SMAs

- Web-based user facing tool that integrates with broker's local socket based API to load live stock data and create buy/sell orders executing \$12M+ in trades of US equities annually
- Incorporates up-to-date daily stock recommendations, short borrow fees, required margins, average daily volume, and buying power
- Seamlessly handles an indefinite number of separately managed accounts where each account has a customized blend of long and short portfolios, leverage ratios, and margin requirements
- Produces a single order per stock to avoid front-running and competing bids between portfolios and accounts; utilizes VWAP execution to minimize slippage

Financial Reporting and Consolidation

- Custom web dashboards tailored to the needs of varied stakeholders
- Pipeline reports and KPIs integrating with different accounting backends to stay updated with a single source of truth and support decision making
- Automated daily consolidation of financial statements of multinational and multilingual subsidiary organizations while resolving errors in Quickbooks' handling of multiple currencies
- Scripted processes satisfying reporting requirements for oversight and compliance with regulatory authorities

Experience

Potential Investments, Ltd. Co.

2009 – Present | General Counsel, Financial Controller, Sr Analyst
Private investment company with a focus on commercial real estate, multifamily residential, and oil & gas.

- General Counsel – contracts, compliance, tax planning
- Financial Controller – reporting, payroll, AP and AR, cash flow, policies
- Operations and Oversight – participating in management decisions
- Acquire and oversee interests in commercial, multifamily residential, and oil & gas operations in multiple states
- Information Technology – build and maintain all tech infra

Potential Wealth Management, LLC

2016 – Present | Chief Compliance Officer, Financial Controller, Sr Analyst
Boutique investment advisor specializing in implementing automated, data-driven trading strategies in separately managed accounts. Registered through the Texas State Securities Board.

- Design, develop and implement quantitative equity investing strategies
- Chief Compliance Officer: legally responsible for the company's compliance with federal and state securities laws; subject to audit by Texas SSB
- Registered Investment Advisor
- Financial Controller: reporting, AP and AR, cash flow, policies
- Create and operate in-house payroll processing system
- Perform annual internal financial audits and regulatory compliance audits

UrbanPromise Honduras, Inc.

2022 – Present | Financial Controller, Advisor

A multinational board-overseen non-profit serving children and youth in Honduras, and supporting local leaders in several surrounding countries.

- Oversee financial administration team
- Implement financial policies and practices including annual budgets, monthly reconciliations, and tax filings. Support independent auditing
- Prepare and file 990s and other regulatory documentation
- Treasury management, executing monthly cashflow