

## ROBERT F. MCCLURE

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### PROFESSIONAL PROFILE

Robert F. McClure is the Portfolio Manager at McClure Investment Management, LLC, a Glendora based RIA that provides discretionary asset management with a minimum account size of \$250,000. In addition, he is a part-time professor at Cal Poly Pomona and Cal State Los Angeles teaching courses in corporate finance, investments, portfolio management, derivatives and fixed income investments. Mr. McClure is also an accomplished musician having performed with the Phoenix Symphony, Los Angeles Pops Orchestra, Phoenix Pops Orchestra and the Southwest Brass Quintet.

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### EDUCATION

#### **MBA**

University of Southern California | Marshall School of Business

1999

#### **MM, French Horn Performance**

University of Southern California | Thornton School of Music

1988

*Wendell Hoss Graduate Fellowship*

#### **BA, Economics**

California State University, Fullerton

1984

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### WORK EXPERIENCE

#### **Portfolio Manager, Owner**

McClure Investment Management, LLC | Glendora, CA

April 2001 to Present

*Primary responsibilities:* Investment policy development, asset allocation, individual security selection and performance reporting. Company uses a value-oriented selection policy that emphasizes distinguishing and acquiring undervalued securities for client portfolios.

*Consulting services:* Company provides portfolio reviews, investment policy reviews and makes tactical and strategic recommendations in security selection and asset allocation. These services are provided for an hourly fee.

Other responsibilities include monitoring compliance with SEC and State Department of Corporations guidelines, maintenance of firm's IT functions and development of marketing efforts.

**Vice-President, Investments, Assistant Office Manager**

Sutro & Co. | Los Angeles, CA

December 1997 to April 2001

*Primary responsibilities:* authorizing client disbursements, new account documentation, margin and option transactions.

Developed financial plans for individual and corporate clients and constructed investment portfolio to meet plan recommendations.

Licenses held include NASD Series 7 (General Securities Representative) as well Series 8 and 9 (Branch Office Manager and Sales Supervision).

**Financial Consultant**

Merrill Lynch & Co. | Century City, CA

October 1989 to December 1997

Developed financial plans for individual and corporate clients and constructed investment portfolio to meet plan recommendations.

Held NASD Series 7 License.

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**TEACHING  
EXPERIENCE**

**California State Polytechnic University, Pomona**

Pomona, CA

September 2007 to Present

*Courses:*

Fundamentals of Financial Management (GBA 546)

Financing Small Businesses (FRL 420)

Investment Analysis (FRL 330)

Managerial Finance I (FRL 300)

Managerial Finance II (FRL 301)

*Honors:*

Part-Time Advisor of the Year - 2008-2009, 2009-2010, 2011-2012

Department of Finance, Real Estate and Law

**Chapman University**

Orange, CA

August 2009 – December 2009

*Courses:*

Financial Management (BUS 607)

Investments (FIN 421)

**California State University, Los Angeles**  
Los Angeles, CA

June 2005 to Present

*Courses:*

Corporate Finance (FIN 303),  
Essential Skills for Finance Professionals (FIN 325),  
Investments (FIN 332),  
Personal Portfolio and Risk Management (FIN 335),  
Securities Analysis (FIN 437),  
Futures and Options (FIN 440),  
Fixed Income Securities, Analysis and Strategies (FIN 450),  
Business Finance and Law (FIN 500)

*Related:*

Featured Speaker, Finance Department  
Cal State Los Angeles Career Day

2006 to 2007

*Book Reviewer*

John Wiley & Sons Inc. *Derivatives Text* by David H. Goldberg

May 2009

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**SERVICE**

**City of Glendora**

*Advestment Advisory Committee*

2003 – 2009

Instrumental in redesign of city's investment policy which received CMTA Certification  
Appointed Committee Chairman, 2nd term, August 2008.

*Citizen's Budget Committee*

2004

Provided City Council with community input regarding funding and operation of the City's  
General Fund services, concentrating on capital maintenance, capital replacement and capital  
improvement.

**Foothill Country Day School**

*Trustee*

May 2010 to Present

*Chairman, Finance Committee*

May 2011 to Present

*Executive Committee*

May 2011 to Present

**USC Thornton School of Music**

Alumni Association

June 2008 – Present