

# PETER RICCHIUTI

## *Home Address:*

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## *Business Address:*

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## *PROFESSIONAL EXPERIENCE*

### Founder & Director (June 1993-Present)

#### Burkenroad Reports

A.B. Freeman School of Business, Tulane University, New Orleans, LA

Founder and director of Burkenroad Reports a securities research program in which Freeman students meet top management, visit company sites, publish and distribute investment research reports on 40 small-cap companies in Louisiana, Mississippi, Alabama, Georgia, Florida and Texas. These reports are distributed to thousands of individual and institutional investors and *The Wall Street Journal*, *Investor's Business Daily*, *The New York Times*, and *The Chronicle of Higher Education*, *The Washington Post* and *BARRONS* have featured the program. Responsible for the development of our website ([www.burkenroad.org](http://www.burkenroad.org)).

The popular *Burkenroad Reports Investment Conference* was launched in 1997. Since then it has grown significantly and currently attracts more than 600 investors each spring. Hundreds of students have participated in this one-of-a-kind program and moved on to careers in the investment industry. In a 2014 competition, sponsored by *Re-Imagine Education*, the program topped entries from 427 universities from 43 countries and was selected as the #1 teaching delivery in experiential learning.

Active in both undergraduate and graduate admissions and development. Founder/faculty advisor for Toastmasters and the faculty advisor for the Green Bull student investment association.

### Professional Public Speaker (June 1989- Present)

Addressed more than 1200 professional, corporate, and industry groups in 47 states. These speeches have covered a variety of subjects concerning finance and investments. Widely acclaimed for both the educational and entertainment content of these programs, these presentations are to audiences of up to 8500 persons and have resulted in invitations for dozens of return engagements.

### Business Radio Show Host (June 2011- Present)

Creator and Host of *Out To Lunch*, a weekly business radio show which airs on the National Public Radio stations in New Orleans. Each week two business leaders or entrepreneurs join me for lunch at Commander's Palace for a discussion of the trials and rewards of running a business. The show has developed a large following of listeners and there are now additional shows on the Baton Rouge and Acadiana NPR affiliates.

### Author "Stocks Under Rocks" (2014)

Wrote this popular book about the investment lessons we have learned over two decades at Burkenroad Reports. This very funny and readable book was published by Pearson and debunks many of the myths that have be-deviled investors over the years.

### Being Your Own Boss Is Terrific (2021)

This is an E-Book focusing on the 40 most interesting entrepreneurs we have had on "Out To Lunch" NPR show. It is a funny and interesting book detailing what I've learned about entrepreneurship in 11 years from 850 guests.

Assistant State Treasurer & Chief Investment Officer (May 1988-June 1993)

Department of the Treasury, State of Louisiana, Baton Rouge, LA

Supervised seven member investment division responsible for managing over three billion dollars in investment securities for the state's general fund and permanent trust funds. Responsible for drafting, supporting and implementing legislation concerning investment, retirement and fiscal issues. Represented the State Treasurer on several pension boards taking lead role in evaluating asset allocation and management performance on seven billion dollars of equity, fixed income, international and real estate investments. Represented the Treasurer's office as a director of several of the State's public pension funds with assets of about \$15 billion.

Instrumental in the following accomplishments:

- Achieved a 10.9% annual return on the \$750 million permanent trust fund
- Creation and sale of *Louisiana College Savers Bonds*
- Initiation of securities lending program for securities held in the Treasury.
- Legislation allowing corporate and government securities in the state's investment portfolio
- Development of a local government investment pool for municipalities.

Personal Finance Instructor (September 1998-2000)

The National Football League

Selected to teach an annual six-session personal finance course to the players and coaches of the New Orleans Saints. This course is mandatory for first and second year players and our class has been featured in *The Baltimore Sun*, *The Dallas Morning News* and *The New Orleans Times-Picayune*. This class has produced a 90% increase in player participation in the league's voluntary retirement plan.

Adjunct/Clinical Professor of Finance (1986-1993)

A. B. Freeman School of Business, Tulane University, New Orleans, LA

Teaching investment courses to senior level undergraduates using both financial theory and personal background to enhance curriculum. Frequently named to the faculty honor roll and have twice received the *Wissner Award* as the school's outstanding professor.

Assistant Dean for Career Development and Placement (June 1993 - December 1995)

A. B. Freeman School of Business, Tulane University, New Orleans, LA

Marketed the School to perspective employers, counseled students and grew our *Career Consultant Network* by 400%. Average salary and placement percentages were significantly increased for our undergraduate and MBA students.

Business and Financial Reporter (January 1988-October 1992)

WVUE-TV, New Orleans, LA

Writer, producer and on-air personality for a popular weekly personal finance report on the ten o'clock news for ABC-TV affiliate. Topics included investment, housing and retirement as well as local and national business issues. Viewed as an innovator in presenting "pocketbook" issues in an entertaining and informative format. *Named 1989 Radio and Television Business Reporter of the Year* by the Press Club of New Orleans.

Adjunct Instructor of Finance (August 1985-May 1987)

University of New Orleans, New Orleans, LA

Taught personal finance and received exceptional student evaluations in each semester.

Registered Representative (January 1984 - August 1984)

Howard, Weil, Labouisse, Friedrichs, New Orleans, LA

Worked with financial institutions to buy, sell and analyze mortgage-backed securities.

Registered Representative (March 1980-August 1983)

Kidder, Peabody & Co Inc., Boston, MA

Managed assets for more than 200 self-generated clients while doubling commissions earned in each year.

Registered Representative (May 1979-March 1980)

Dean Witter Reynolds Inc., Boston, MA

Passed all NASD exams. Top fifth of training class in both commissions and new accounts.

#### *EDUCATION*

University of New Orleans, New Orleans, LA

Masters of Business Administration, December 1986

President of Finance Honors Society.

Received honors scholarship to summer program in Austria.

Babson College, Babson Park, MA

Bachelor of Science in Management, May 1979

Dean's List, Blue Key National Honor Fraternity, Varsity Baseball, Residence Hall Director

Film Festival Award and *Who's Who Among Students in American Universities and Colleges*, 1978-1979.

Institute of Chartered Financial Analysts, Charlottesville, VA

Successfully completed first of three exams needed for CFA designation, June 1987.

#### *HONORS & BOARD DIRECTORSHIPS:*

Named as one of the "Twenty People to Watch" in the June 1999 issue of New Orleans, magazine.

Selected as a "Leadership Role Model for 2000" by *The New Orleans Young Leadership Council*.

Celebrity Co-Chair of "Propeller Pop 2016" This is the Annual Gala/Fund Raiser for the City's Social Entrepreneurship incubator.

Named to the 2018 Silicon Bayou 100. This is the annual list of the 100 most influential and active people in tech and entrepreneurship in Louisiana over the last year. (January, 2019)

Recipient of the Inaugural Tulane Faculty Alumni Award (January, 2019)

Board Member, WWNO Radio New Orleans, LA (June 2013-June 2017)

Board Member of Amedisys, Inc. (AMED/NASDAQ), Baton Rouge, LA (July 1997-June 2015)

WYES -TV (Public Television) New Orleans, LA (1993-1999)

New Orleans Regional Chamber of Commerce, New Orleans, LA (June 1999-2000)

Member, City of New Orleans Revenue Estimating Committee, Feb. 2000 thru December 2018.

Named to the 2018 Silicon Bayou 100. This is the annual list of the 100 most influential and active people in tech and entrepreneurship in Louisiana over the last year. (January, 2019)

Recipient of the Inaugural Tulane Faculty Alumni Award (January, 2019)

The Peter Ricchiuti Professorship was awarded to Professor Myke Yest (endowed May 2018)