

# Dr. Stephen R. Rush, CFA

Bowling Green State University  
214 Business Administration Building  
Bowling Green, OH 43403-0001

Email: [srrush@bgsu.edu](mailto:srrush@bgsu.edu)  
Phone: (419) 372-8972  
LinkedIn: <http://www.linkedin.com/in/stephenrush>

## Experience

### **Assistant Professor of Finance, Bowling Green State University**

**August 2016 to Present**

FIN 4350 and MBA 5510 - Investment Analysis and Management  
FIN 4360 - Portfolio Management and Student Managed Investment Fund  
MBA 6060 - Financial Management

### **Finance Instructor, The University of Connecticut School of Business**

**August 2012 to May 2016**

FNCE 3101 - Financial Management  
FNCE 3302 - Investments and Security Analysis  
FNCE 4306 - Financial Services

### **Finance Lecturer, Bryant University**

**May 2012 to May 2016**

FIN 201 - Financial Management  
FIN 312 - Investments  
FIN 315 - Financial Institutions and Markets

### **Investment Analyst, Amica Mutual Insurance**

**August 2007 to December 2009**

Researched, recommended, and traded equities in the Technology and Alternative Energy sectors  
Voted proxy statements on approximately 60 companies  
Developed quantitative valuation models to evaluate individual company performance  
Made weekly recommendations to the Chief Investment Officer and bimonthly written reports to the board of directors  
Part of a team that managed approximately \$5 billion across 6 portfolios beating the S&P 500

### **Fund Accountant, State Street Bank and Trust**

**June 2007 to August 2007**

Calculate NAV daily based on Bloomberg, Reuters, and IDC price and exchange rate information  
Adjusting entries for share transactions, currency derivatives, expense accruals, and income payments  
Fix failing trades and find missing information on non-DTC settled trades  
Responsible for over \$7 billion in assets under custody

### **Political / Military Analyst, U.S. Army Reserve**

**March 2005 to March 2007**

Wrote background papers for the European Command Joint Analysis Center  
Coordinated analysis with reporting personnel

### **Sergeant, U.S. Marine Corps**

**August 1996 to February 2005**

Intelligence Chief - Provided the commanding officer with enemy strength, location, and probable courses of action  
Platoon Sergeant - Supervised 35 Marines  
Marine Band Pianist and Jazz Combo Leader

## Education

- Ph.D. Finance, The University of Connecticut School of Business** 2016  
Dissertation: Essays on Information Diffusion and Adverse Selection  
2015 Finance Department Outstanding Ph.D. Student Scholar Award Recipient  
2013 Finance Department Outstanding Ph.D. Student Scholar Award Recipient  
2011 UConn School of Business Ph.D. Fellowship Recipient
- MBA and M.Sc. Finance, Boston College** 2011  
Ranked #2 MSF program in the U.S. by the Financial Times  
*Activities:* Graduate Tech Trek West, 2011  
*Additional Studies:* Mathematics, Harvard University, 2010
- B.S. Business Administration, Bryant University** 2007  
*Concentrations:* Finance and Economics  
*Honors:* Magna Cum Laude in the Honors Program, Beta Gamma Sigma, Omicron Delta Epsilon  
*International Studies:* Chinese, Capital Normal University, Beijing, China, Summer 2006

## Research

- A Network Analysis of Information Diffusion  
Currency Risk and Information Diffusion  
Identifying and Pricing Adverse Selection Risk with VPIN  
The Bond Coupon's Impact on Liquidity  
Louton, D., McCarthy, J., Rush, S., Saraoglu, H., and Sosa, O., 2015, Tactical Asset Allocation for U.S. Pension Investors: How Tactical Should the Plan Be? *Journal of Asset Management* 16, 427-436.  
Rush, S. and Mirmirani, S., 2009, Can Increased Trade Prevent Conflict with China? *International Business & Economics Research Journal* 8.2.

## Conference Presentations

- 2016 Eastern Finance Association  
2015 FMA Doctoral Student Consortium  
2015 Vietnam International Conference in Finance  
2013 Academic Forum  
2012-2015 R/Finance: Applied Finance with R  
2008 International Applied Business Research Conference

## Academic Service

- Board Member - *Bryant University Archway Investment Fund*  
Program Committee - *2012 Universitas 21 Doctoral Research Conference in Business*  
Mendeley Advisor - teaching other researchers how to use Mendeley software for citation and paper management  
Honors Advising and Thesis Supervision

## Recognition

- Best Paper Award - *IABR and TLC Conferences, 2008*  
Best Honors Thesis - *Bryant University, 2007*  
Humanitarian Service Award - *U.S. Marine Corps Flood Relief in Albany, GA*  
Distinguished Graduate - *Navy and Marine Corps Intelligence Training Center*

## Professional

- Chartered Financial Analyst  
Membership: *American Finance Association, Financial Management Association, CFA Society Providence*

## References

**Thomas O'Brien** (Committee Chair)  
University of Connecticut  
2100 Hillside Road, Unit 1041  
Storrs, CT 06269  
(860) 628-1849  
Tom.O'Brien@business.uconn.edu

**Paul Borochin** (Advisor)  
University of Connecticut  
2100 Hillside Road, Unit 1041  
Storrs, CT 06269  
(860) 486-2774  
Paul.Borochin@business.uconn.edu

**David Louton**  
Bryant University  
1150 Douglas Pike  
Smithfield, RI 02917  
(401) 523-0669  
dlouton@bryant.edu

**Brian Peterson** (Advisor)  
DV Trading  
216 W. Jackson, Suite 320  
Chicago, IL 60606  
(773) 459-4973  
brian@braverock.com

Last updated: December 13, 2016