

DIANE HIRSCHHORN

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EXPERIENCE

Lecturer, University of Colorado Boulder 2018 - Present

- Teach courses in Investment and Portfolio Management, Portfolio Management, Personal Finance, and Principles of Wealth Management.
- Recipient of the Marinus Smith Award for exceptional contributions to students and the university community.
- Maintain a 60% instructor role, balancing teaching responsibilities with professional commitments.

First Republic Bank Managing Director 2017 - 2020

- Co-manage, along with business partner, over \$750 million in assets.
- Specialize in managing portfolios for wealthy families with \$10 million to \$100 million in investable assets.
- Responsibilities include: equity and fixed income portfolio management, single stock risk management, tax efficient investment advice, pre-ipo and pre-merger planning, trust and estate planning, insurance advice, securities based lending and home financing, cash flow analysis, asset allocation, fee based portfolio management and alternative investment analysis.
- Received numerous industry awards including: Barron's Top 1000 Advisors (2010 and 2013), and Top 30 Advisors in Los Angeles, Barron's Top 100 Female Advisors (2006, 2007, 2008).
- Have one of the highest client retention rates at the firm.

Merrill Lynch Senior Vice President- Wealth Management 2000- June, 2017

- Responsibilities identical to those of First Republic Bank. Merrill recruited my business partner and me from Goldman Sachs. We brought our clients and business with us to Merrill Lynch and later to First Republic Bank.

Goldman Sachs Private Client Advisor 1997 - 2000

- Responsibilities identical to those of Merrill Lynch. Merrill recruited my business partner and me from Goldman Sachs. We brought our clients and business with us to Merrill Lynch.

Avid Technology/CSI Digital Senior Account Executive 1995 - 1997

- Ranked as one of the top three sales reps in the region.
- Achieved 125% of quota in 1995 based upon an annual quota of \$3.6 million.
- Sold computerized film editing systems, and networking/graphics equipment.

Ethicon Endo-Surgery (Johnson & Johnson) Sales Representative 1992 - 1995

- Ranked among the top 10% of sales force.
- Member of \$150,000, \$250,000, \$500,000 and \$1,000,000 sales clubs.
- Achieved highest market penetration in region by converting all accounts in territory.
- Produced an annual volume of over \$1,000,000 in a territory that historically produced less than \$500,000 by developing new accounts.
- Sold high tech surgical instruments.

Innovative Marble and Tile, Inc.

Sales Executive 1992 - 1995

- Helped increase annual sales of company from \$20,000,000 to \$24,000,000 by instituting formalized training program, creating a more effective commission structure, and by focusing sales force on repeat sales.
- Developed business in large competitive accounts including J.C. Penney and Sears.

Xerox Corporation Account Manager 1992 - 1995

- Ranked #1 on district sales team and in top 2% of national sales force.
- Promoted 3 times in 3 years.
- Selected as Syracuse District Rookie of the Year.
- Consistently achieved Xerox's highest award, President's Club.
- Promoted to manager of mid-volume copier sales of a ten person team.

EDUCATION

The Anderson School at UCLA June 1997

- M.B.A. in Finance.
- Security Analysis independent study grade A+.
- Finished in the top 10% of the Green Line Collegiate Investment Challenge.
- Served on investment panel at UCLA alumni conference.

Cornell University May 1987

- B.A., Economics
- Dean's List

OTHER

Interests

- Enjoy hiking, biking, reading, traveling, spending time with family and friends.
- Board member of Growing Up Boulder.
- Help allocate Boulder Community Foundation grants.
- Volunteer at Circle of Care.
- Given lectures on finance to YWCA and Boulder Rotary Club.