

# John P. Toohey, CFA

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## Experience

**UTSA Alvarez College of Business**, San Antonio, TX January 2020 – Present  
**Assistant Professor of Practice, Finance Department**

Instructor for Principles of Investment (Fall semester), Debt Markets (Spring semester), student internships.

**Two Centuries Investments**, Hopewell, NJ February 2020 – Present  
**Head of Fundamental Research**

Perform public equity, public debt, hedge fund, private credit, and asset allocation research for individuals, small businesses, and a multi-family office.

**St. Luke's Lutheran Health Ministries**, San Antonio, TX May 2020 – Present  
**Investment Committee, Audit Committee**

**Astraa**, Campbell, CA January 2023 – Present  
**Business Advisor**

**USAA Asset Management Company**, San Antonio, TX January 2012 – June 2019  
**Head of Equities and Vice President**

Built, headed and mentored a team of equity portfolio managers, research directors and analysts.

- Grew the equity platform to 6 actively managed strategies, \$7.5 billion in assets under management, and 17 equity professionals.
- Co-managed over \$1.5 billion in global dividend equities, including the USAA Global Equity Income Fund.
- Met with senior management teams of more than 100 publicly traded companies.
- Represented USAA Investments as a subject matter expert with television (Bloomberg News, CNBC, Fox Business), radio and print media and authored financial market commentaries for USAA.
- Served as a USAA Mutual Funds Trust officer for 10 years.

**Co-Head of Equities and Vice President** February 2009 – December 2011

Co-led an initiative to grow USAA's investment solutions business, including launching 3 new mutual funds.

- Co-managed asset allocation mutual funds with over \$3 billion in assets.
- Researched, hired and monitored more than 20 mutual fund sub-advisers for \$20 billion in assets.
- Advised \$3 billion in managed accounts.

**AIG Investments**, New York, NY

**CIO, U.S. Pension Fund and Managing Director, Equities**

December 2003 – January 2009

Oversaw investments for AIG's defined benefit and defined contribution plans globally.

- Expanded the \$3 billion U.S. pension fund to include alternatives and interest rate derivatives.
- Helped redesign a retirement system for a country in Asia.
- Co-managed 4 asset allocation mutual funds and oversaw \$9 billion equity index business.

**Vice President, Global Risk Management**

December 2000 – December 2003

Analyzed complex securities, developed risk management models, and performed M&A due diligence.

- Analyzed and purchased private, structured fixed income investments.
- Priced interest rate and equity derivative securities.
- Performed M&A due diligence for two acquisitions (\$23 billion and \$2 billion).

### **Additional Relevant Experience**

**Convent Station, NJ | Director at MetLife Investments**

**MetLife, New York, NY | Assistant Vice President and Actuary**

### **Education and Training**

**Bachelor of Arts (BA), Mathematics**, magna cum laude, Williams College, Williamstown, MA

- Teaching Assistant, Multivariable Calculus

CFA® charterholder and Fellow of the Society of Actuaries

### **Publications**

J. Toohey. Beyond LDI: Integrated Asset-Liability Management. *AIG Global Investment Group*, 2007.

A. Stais and J. Toohey. Participating GICs: Performance Attribution Analysis. *Journal of Actuarial Practice*, 1996.