

## Roderick Batiste, MBA

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### State of Georgia Pension Funds

Oct 1997 - Present

Investment Analyst, Portfolio Manager

Part of a team that manages the \$100 billion Teachers and Employees Retirement fund for the State of Georgia. Personally responsible for the oversight of approximately \$8 billion in assets in the industrial and healthcare industries.

- Conduct in-depth research and analysis of financial data to identify investment opportunities and potential risks.
- Design valuation models including discounted cash flow, market multiple analysis, market transactions modeling.
- Manage the valuation analysis on a wide range of investments and assets within these industries and sectors.

### PINNACLE Investment Advisors

May 1994 – Oct 1997

Investment Analyst, Vice President

Was instrumental in assisting in the start-up of a boutique institutional investment advisory firm.

- Utilized technical background to setup accounting and investment trading systems.
- Developed and implemented a strategic plan that grew the firm's asset base to over \$100 million within the first two years.
- Assisted the Chief Investment Officer in conducting primary research on publicly traded companies for inclusion in a concentrated portfolio.

### Bank of America

May 1989 – May 1994

Vice President, Middle Markets

Responsible for new business development, portfolio management, underwriting to support the needs of the group and for cross-selling a wide-range of bank products to commercial accounts.

Worked with corporate clients to collect and analyze financial and related data to determine the general creditworthiness and the merits of the specific loan request.

- Maintained and developed customer relationships, new business, and periodic review of existing loan arrangements.
- Accept special projects in support of the team and community involvement.
- Maintain knowledge of corporate banking, credit and non-credit products, trust, real estate, treasury management and other bank functions.

## Education

### **Master's of Business Administration**

Concentration: Finance

Atlanta University, Graduate School of Business

### **Bachelors of Science, Dual Major Marketing / Computer Science**

Xavier University, New Orleans, Louisiana

## Community Support and Economic Empowerment

### **The Community Foundation for Financial Literacy, Inc. (Non-profit)**

Chairman, Founder

**2008 - Present**

Atlanta, GA

Founded a community-based organization that supports local high school and college students and their parents by teaching personal finance concepts, assisting with college admissions and by providing annual scholarships.

Provide fiscal sponsorship for other local nonprofits that gives away over \$50,000 each year to the community and that supports new banking products for un-banked and under-banked consumers.

### **YES! Atlanta (Non-profit)**

Treasurer, Board Member, Volunteer

**2004 - 2007**

Atlanta, GA

Managed the finances and accounting for an at-risk youth nonprofit. Worked with the organizations certified accountants to ensure timely financial reporting for the Board of Directors. Oversaw the administration of all grants and Internal Revenue Service annual filings.

### **Morehouse Innovation & Entrepreneurship Center**

Accounting and Finance Mentor

Aug 2021 - Present ·

Assist small business owners with organizing and planning standard accounting processes and procedures. Assist owners with the development of cash flow modeling and financial projections that support growth plans.

### **StartMe Atlanta @ Emory University**

Business Mentor

Jan 2022 - Present ·

Start:ME is an intensive 14-session, place-based business accelerator program for promising entrepreneurs who live in, work in, and/or provide valuable products and services to underserved neighborhoods. During the 14-sessions, and beyond, we connect those entrepreneurs to the business know-how, mentorship, and funding necessary to build and grow businesses.