

David M. Amoss, CFA

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EXPERIENCE

Project Developer; January 2021 to Present

BERNHARD LLC; New Orleans, Louisiana

- ◆ Source pipeline of \$40M to \$200M opportunities for Energy Asset Concessions in Higher Education and Healthcare verticals
- ◆ Develop long-term energy efficiency Concession transactions including front-end Due Diligence, financial structuring and modeling, customer communication, scope development, contract negotiation, financing
- ◆ Manage Louisiana lobbying and agent relationships
- ◆ Manage industry partnership relationships

Investment Consultant; October 2020 to Present

MAVEN ROYALTY PARTNERS; Shreveport, Louisiana

- ◆ Provide analysis for \$200M royalty investment fund helping to determine location selection and financial implications
- ◆ Assist fund management in generating quarterly investor letter and Board presentations
- ◆ Design fund-raising materials and help with investor targeting strategy

Faculty; January 2021 to Present

LOYOLA UNIVERSITY COLLEGE OF BUSINESS; New Orleans, Louisiana

- ◆ Teach Financial Statement Analysis to Accounting and Finance students

Head of Midstream and Downstream Research; October 2015 to January 2021

HEIKKINEN ENERGY ADVISORS; New Orleans, Louisiana

- ◆ Built and manage Midstream and Refining research business for best-in-class energy-focused investment bank
- ◆ Led firm-wide macroeconomic analysis projects: crude, NGL, and natural gas
- ◆ Maintain detailed company models predicting throughput and financials
- ◆ Advise clients on company valuation and corporate strategy
- ◆ Participate in capital markets transactions as research analyst
- ◆ Regular publication about relative valuation of public midstream companies and long-term growth prospects
- ◆ Evaluate covered company growth metrics, ROIC, capital spending effectiveness, re-investment of cash flows
- ◆ Travel frequently to investor market areas for analyst marketing, company management meetings, and NDRs

Upstream Research Analyst (VP, Sr. Research Analyst); May 2014 to October 2015

IBERIA CAPITAL PARTNERS; New Orleans, Louisiana

- ◆ Cover Mid Cap and Small Cap E&P companies
- ◆ Led E&P product development instituting weekly thematic highlights and valuation analysis
- ◆ Created firm-wide Basin Economics analysis and worked to create firm Macro opinions
- ◆ Market research to buy-side clients across US and Canada

Upstream Research Analyst; 2010 to May 2014

HOWARD WEIL, INC.; New Orleans, Louisiana

- ◆ Cover Mid Cap and Small Cap E&P companies
- ◆ Assist investment banking effort for equity and debt transaction due diligence
- ◆ Meet regularly with E&P company management teams to update short-term and long-term assumptions
- ◆ Publish research regularly including both company and industry-wide analysis
- ◆ Maintain and update detailed financial models for public and private upstream companies
- ◆ Develop detailed waterfall production models to track and predict company growth
- ◆ Develop new firm data sources including HPDI, GIS capability, and detailed rig count tracking; regularly monitor state well data for incremental information

Economist; 2007 to 2010

AECOM ECONOMICS (FORMERLY ECONOMICS RESEARCH ASSOC.); Chicago, Illinois
MAUNSELL|AECOM (SECONDMENT); Sydney, Australia (September through December 2009)

- ◆ Create financial models to analyze demand potential and financial performance including revenue estimation, capital and operating expense assumptions, and profit potential. Specialization in transportation and energy public-private partnerships (PPP).
- ◆ Perform detailed analysis of investment demand for real estate uses including residential, retail, office, and industrial projects; forecasted usage and financial performance.
- ◆ Conduct demand modeling, route selection and cost analysis, planning and strategy, and economic and fiscal impact related to multimodal freight transportation.
- ◆ Selected to the AECOM Young Leadership Development and Training program

Director of Finance; 2003 to 2007

AMOSS TRADING SERVICES, INC./SEAPOINT, LLC ; New Orleans, Louisiana

- ◆ Served as head of Finance for an industrial distributor of imported Marine equipment with responsibility for preparing financial statements, budget projections, and sales analysis. Managed sales, purchasing, and transportation activities. Traveled frequently to China to perform factory audits, meet with shippers, and accomplish sourcing objectives.

EDUCATION, MEMBERSHIPS, AWARDS & CERTIFICATIONS

Professional Certifications/Education

- ◆ **CFA Charterholder**; Member of CFA Exam Review Team 2017, Grader 2020-Present
- ◆ **Board Member**: Timber Ridge POA (Pass Christian, MS), 2021-Present
- ◆ **President/Board Director**: CFA Society of Louisiana, 2012-2015
- ◆ **Board Chair/Board Member**: Lycee Francais de la Nouvelle Orleans charter school, 2016-2022
 - Raised funding and helped manage effort to renovate 30-year vacant school building in Uptown New Orleans (\$18M project)
 - Led Finance and Facilities Committees
- ◆ **Board Member/Marketing Committee Chair**: CRIMESTOPPERS, INC.; New Orleans, LA. 2004-2007
- ◆ **Recipient**: Kimberly Paige Memorial Study Scholarship, January 2010, CFA Society of Chicago
- ◆ **Series 7, 63, 86, and 87**

Bachelor of Business Administration (B.B.A.) Degree; 2003

UNIVERSITY OF GEORGIA; Athens, Georgia