

RICHARD F. JOHNSON, CFA

March 2026

Education

Undergraduate: Pacific Lutheran University, Tacoma, Washington; 1983-85; B.B.A., 1985 (Finance).

Graduate: Graduate School of Business (now the Booth School), University of Chicago; 1990-92; MBA, 1992 (Finance and Marketing).

MBA Business Program Extension (no degree conferred), Booth School of Business, University of Chicago; 2009-2010.

Physical Sciences Division, University of Chicago; 2018-2022; MScA (Applied Data Science), 2022; Capstone Project: *"Using Analytics to Grow Alpha"*.

Certification: CFA® charterholder, CFA Institute; September 2001.

Certificate of Completion (18 units), Continuing Studies Program, Stanford University; 2006.

Certificate of Completion, Value Investing, Executive Education, Graduate School of Business, Columbia University; 2009.

Certificate of Completion, Understanding Leadership Integrity, In the Back to Booth Series, Booth School of Business, University of Chicago; 2016.

Select Courses: Corporate Finance, Robert Hamada, former Dean, Booth School of Business, University of Chicago; 1991.

Theory of Financial Decisions I, Professor Eugene Fama, 2013 Nobel laureate in economic sciences, Booth School of Business, University of Chicago; 2009.

Advanced Microeconomic Analysis, Professor Kevin Murphy, 1997 John Bates Clark Metalist, Booth School of Business, University of Chicago; 2018.

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Honors and Activities

At Western Washington University:

Math Tutor, 1 of 3 students selected to tutor Algebra.

President's List (1982-83).

At Pacific Lutheran University:

Inducted into Beta Gamma Sigma (as a Junior), 1984.

Elected President of Beta Gamma Sigma Chapter, 1984-85.

Delegate to BGS/AACSB National Biennial Meeting,
Phoenix, Arizona, 1984.

Organized Annual Spring Banquet inviting Dixie Lee Ray,
former Governor of the State of Washington, as a keynote
speaker and honorary member, and Leif Eie, Director of
Scandinavian Airline Systems, as honorary member, 1985.

Collaborated on Beta Gamma Sigma case study used in
basic management and policy courses at Pacific Lutheran
University, Louisiana Tech University, and University of
Missouri-Kansas City, 1985.

Recognized as one of three outstanding chapters by
National Board of Governors, Beta Gamma Sigma, 1985.

Honors seminars in Business Policy and Financial
Accounting, 1985.

Mary Lund Davis Student Investment Fund, 1984-85.

Wall Street Journal Student Achievement Award, 1985.

Graduated Cum Laude, 1985.

Volunteer Mentor, Career Mentorship Program, Pacific
Lutheran University, 1992.

Contributing Writer, *Pacific Lutheran University School of
Business Alumni Newsletter* (Spring 1992).

Guest speaker, PLU Regent's Investment Fund, 2024.

Guest lecturer, Introduction to Business (BUSA 201),
Professor Philip Fawcett, October 29, 2024.

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At University of Chicago:

Dean's List (Spring, 1991).

Founding member, Student Investment Fund.

Group Leader, Student Consulting Group.

"Little Red Schoolhouse" Academic and Professional Writing, 1991.

New Product Laboratory, 1991.

American Finance Association Meeting, Boston.

Guest Lecturer, Warsaw School of Economics, 1991.

Contributing Writer, *Chicago Business*, 1991.

Meeting with Robert Vishny on experience in Eastern Europe, Professor, Graduate School of Business, University of Chicago, 1991.

Alumni Interviewer for candidates in San Francisco, Graduate School of Business, University of Chicago.

Recognized (in writing) by the Graduate Business Council for assisting current students during their career search, University of Chicago, Graduate School of Business, 2003.

Alumni Board Representative, MSCA Student Board, Master of Science in Analytics Program, University of Chicago, 2018-2019.

Presented Capstone Project titled: *Using Analytics to Grow Alpha*, Capstone Showcase for Master of Science in Analytics Program, Physical Sciences Division, University of Chicago, December 4, 2021.

Received Capstone Project Team Award: *Honorable Mention*, Capstone Showcase for Master of Science in Analytics Program, Physical Sciences Division, University of Chicago, 2021.

Member, American Statistical Association, Chicago Chapter.

Work Experience

1985-1987	Cost Accountant, Central Finance, Kent Space Center, Boeing Aerospace Company.
1988-1990	Data Analyst, Pension Consulting, Wilshire Associates Incorporated.
1991-1991	Internship: Management Consultant, Privatization & Restructuring, ITCA Europe, Ltd., Warsaw, Poland, 1991.
1992-1994	Associate, Institutional Sales, Harris Bretall Sullivan & Smith, Inc.
1994-2000	Principal & Acting Head of U.S. Equity Index Investments, U.S. Equity Index Investments, Barclays Global Investors.
2000-2004	Portfolio Manager, U.S. Large Capitalization Core Equity, Morgan Stanley & Company.
2005-2007	Manager & Partner, Crescat Global Macro Fund LP, Crescat Partners LLC.
2007-2008	Portfolio Manager, Global Long-Short Equity Hedge Fund, Menta Capital, LLC.
2010-2017	Portfolio Manager, U.S. Equity Portfolio Management, Russell Investments.
2018-2019	Principal, Structured Financial Visualization, LLC.
2019-2020	Senior Vice President & Product Manager, Investment Strategies (1-Year Project Budget), Mesirow Financial.
2020-2022	Director of Research, SFV Analytics, LLC.
2022-2024	Independent Consultant, Self-Employed.
2024-Present	Adjunct Professor of Finance, School of Business, Pacific Lutheran University.

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Professional Activities & Awards

Member, CFA Institute, CFA San Francisco, and previous member of CFA Chicago.

Member, Chicago Quantitative Alliance.

Global Leadership Essentials, San Francisco (May) and Tokyo (June), Barclays Global Investors, 1999.

Teamwork Award, Russell Investments, 2011.

Publications

"A Summer in Eastern Europe", *Chicago Business*, University of Chicago (1991).

"Reflections On A Summer in Eastern Europe", *Business Scene, Pacific Lutheran University School of Business Administration Alumni Newsletter* (Spring 1992).

Courses Taught

At Pacific Lutheran University:

Undergraduate: Financial Analysis and Strategy (BUSA 437), Fall 2024

Empirical Finance (BUSA 438), Spring 2024, Spring 2025