

MATTHEW B. DUDLEY

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BUSINESS DEVELOPMENT & RELATIONSHIP MANAGEMENT

Growth-focused leader with over 18 years of stewarding sales and business development to ensure client loyalty and satisfaction

— AREAS OF EXPERTISE —

Sales & Business Development • Relationship Management • Client Satisfaction & Retention
Territory Management & Expansion • Account Development & Growth • Long & Complex Sales Cycles
Institutional Clients • Exceeding Revenue Goals • Consultative & Solution Selling
Corporate Management Teams • Hard-Hitting Negotiations • New Product Launches

PROFESSIONAL EXPERIENCE

Lake Street Capital Markets LLC. Minneapolis, MN
Vice President, Institutional Sales & Business Development 2014 – 2016

Identify, research, and engage with prospective clients in 45 established accounts. Maintained knowledge of universe of 100 small and micro-cap companies. Collaborated with research analysts and traders to service portfolio managers and analysts at small hedge funds and large mutual fund groups. Participated in roadshows with C-Suite executives for several geographies.

Key Accomplishments:

- Closed two investment banking opportunities for \$10,000,000+ figure capital raises.
- Opened 15 large mutual fund families as new accounts, including making research broker votes.

E2P Partners LLC. Minneapolis, MN
Partner 2014

E2P Partners was a start-up frontier and emerging market venture capital fund focused on Sub-Saharan Africa and India. E2P was closed when the partners determined we would not be able to raise the necessary capital.

Key Accomplishments:

- Drafted all pertinent documents, materials and presentations.
- Identified and solicited over 40 potential investors.
- Performed due diligence on 10 potential investments.

The Leuthold Group LLC – Leuthold Weeden Institutional Research Minneapolis, MN
Vice President of Research Sales 2002 – 2014

Initiated research sales of macro investment strategy and equity group research through relationship management processes. Maintained multiple broker voting systems. Cultivated clients to deliver their interests and concerns to research analysts.

Key Accomplishments:

- Identified new sales potentials throughout the U.S. and Canada serving clients throughout the investment decision-making process.
- Possess extensive knowledge of financial market history and firm's research covering 30 years; enhancing and sustaining exceptional client rating and credibility.

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Managing Editor, Research Publications

2008 – 2014

Editor of research for all weekly, monthly and quarterly publications, reviewing all research prior to distribution as print or electronic media. Determined research agendas with the Chief Investment Officer and the Director of Research. Prepared client presentations and monthly investment summary for clientele.

Key Accomplishments:

- Editor of Steve Leuthold's *View From The North Country* from 2008 to 2012.
- Managing Editor, *Perception for the Professional* from 2012 to 2014.
- Created "At Random" humor section monthly and "10 Year's Best Of" edition for publication.

The Leuthold Group LLC – Leuthold Weeden Capital Management

Vice President

2005 – 2014

Communicate investment strategies to clients including investment advisory firms, broker dealers, wire houses, and family offices across the U.S. and Asia. Established institutional research access and quarterly investment reports for multiple accounts. Involved in development of global tactical asset allocation and equity strategies.

Key Accomplishment:

- Realized revenue growth by growing assets under management from \$1B to \$5B in four years.

Relevant Experience

PRIVATE CLIENT SERVICES GROUP ASSOCIATE, **Lehman Brothers**, Chicago & New York
SALES REPRESENTATIVE, **Standard Register**, St. Paul, MN

EDUCATION AND CREDENTIALS

MBA, Carlson School of Management

UNIVERSITY OF MINNESOTA – Minneapolis, MN

Bachelor of Arts

COLLEGE OF THE HOLY CROSS – Worcester, MA

Commissioned as a U.S. Navy Officer (Inactive Reserve)

Professional Development & Licensures:

FINRA Series 7, 66

Interned with Citibank Foreign Exchange Sales & Trading in New York

COMMUNITY INVOLVEMENT

- Board Member & Chair of the Board for University of Minnesota Carlson Funds Enterprise Board of Overseers. Awarded prestigious University of Minnesota Alumni Service Award
- Development Strategist, Simon Says Give
- Treasurer, Holy Cross Club of Minnesota
- Chair, Commission on Administration & Parish Life, St. Thomas More Catholic Church Member of Finance Council
- Saint Thomas Academy *Opus Sancti Thomae* Award Committee, Alumni Association Board
- Hockey Coach, St. Paul Capitals Youth Hockey Association