

STATE OF OHIO
JUL 4 AM 9:30
Executive Department

OFFICE OF THE GOVERNOR

Columbus

I, Mike DeWine, Governor of the State of Ohio, do hereby appoint David S. Currier, from Columbus, Franklin County, Ohio, as a Member of the Bureau of Workers' Compensation Board of Directors for a new term beginning June 12, 2024 and ending at the close of business June 11, 2027, replacing David S. Currier, whose term expired.



IN WITNESS WHEREOF, I have hereunto subscribed my name and caused the Great Seal of the State of Ohio to be affixed, at Columbus, this 9th day of May in the year of our Lord, Two Thousand and Twenty Four.

Mike DeWine

Mike DeWine
Governor

DAVID S. CURRIER, CFA, CFP

2409 Dover Road • Columbus, Ohio 43209 • 614.937.7685 • DavidSCurrier@gmail.com

Focused, self-motivated, goal-driven professional with twelve years of experience in portfolio management and two and a half years of experience in the real-estate market. Ability to quickly and efficiently adapt to new business practices and policies. Effective communication with peers to complete and manage projects. Eager to learn all aspects of new opportunities to provide meaningful insight and improve efficiency.

AREAS OF EXPERTISE

Investment Analysis • Performance Reporting • Derivatives • Project Management • Quantitative Data Analysis • Fixed Income • Risk Management • Client Relations • Portfolio Management

CAREER HISTORY

Ohio Bureau of Workers' Compensation • Columbus, Oh – July. 2021 – Present

Provides medical and compensation benefits for work-related injuries, diseases, and deaths. The Ohio Bureau of Workers' Compensation is the largest state-operated insurance fund in the United States with assets under management of approximately \$20 billion.

Member – Board of Directors

Mercer Advisors/First Ohio Planning • Columbus, Oh – Dec. 2018 – Present

Full-service wealth management firm with over \$20 billion of assets under management. Provide clients with holistic financial advisory services including investment, estate planning, tax, and insurance solutions

Wealth Advisor

- ◆ Analyze, construct, and monitor financial plans for private wealth clients.
- ◆ Facilitate all investment related activities for clients as well as managing client communications.
- ◆ Closely supervise risk levels to match client tolerance within portfolios.
- ◆ Function as primary trusted advisor for high-net-worth clients.

Portfolio Manager

- ◆ Responsible for developing and maintaining portfolios for 300+ private wealth clients with assets in excess of \$200MM.
- ◆ Manage all buying and selling decisions across portfolios to maintain proper risk levels.
- ◆ Manage 40+ Employee Retirement Income Security Act (ERISA) plans with assets of more than \$150MM.
- ◆ Develop and monitor investment options for plan participants and act as a plan fiduciary.

Copper Run Capital, LLC • Columbus, Oh – Jan. 2018 – December 2018

Middle market M&A advisory firm providing buy and sell-side services. Since inception in 2008, Copper Run has closed over 100 deals in numerous states across the United States.

Associate

- ◆ Performed full valuations of private companies using a variety of financial models and methods.
- ◆ Market and manage private companies through the full sales process including comprehensive legal and financial due diligence.
- ◆ Maintain buy-side client relationships and source all target acquisition opportunities. Execute all correspondence with targets from deal initiation to closing.
- ◆ Evaluate capital structure of companies in order to provide the lowest cost of capital for future growth plans.

JDM Investment Counsel, LLC • Columbus, Oh - 2009-2017

Emerging money manager with approximately \$50mm in assets under management. Manage multiple equity portfolio styles, along with separately managed accounts.

Business Development/Fund Manager (2009-2017)

- ◆ Assist in all fund investment, allocation, and portfolio style decisions
- ◆ Skilled in using quantitative investment analysis techniques to determine appropriate equity and fixed-income opportunities for clients.
- ◆ Monitor market conditions and analyze macro and microeconomic conditions
- ◆ Maintain client relations and generate specific reports tailored to specific client needs.

Vogt, Williams, and Bowen, LLC (Now VS Insights) • Columbus, OH - Aug. 2006- Dec. 2008

Nationally recognized real estate feasibility firm that provides market forecasts for a broad range of clients. Specialized in Low-Income Housing Tax Credit (LIHTC) and HUD Section 8 housing.

Project Director (Dec. 2007-Dec. 2008)

- ◆ Conducted real-estate market feasibility studies throughout the United States for numerous development types including: upscale market-rate apartment properties, for-sale condominium properties, student-housing communities, and affordable senior and family housing projects.
- ◆ Worked directly with government and state agencies, syndicators, and investors to determine feasibility of proposed projects
- ◆ Completed concise evaluations of economic, demographic, and housing data to determine appropriate trends in the markets being studied.
- ◆ Managed and directed internal and field staff to meet project deadlines.
- ◆ Worked with appraisers to conduct HUD-Approved Rent Comparability Studies to establish achievable market rents for government-subsidized rental communities.

Field Analyst (Aug. 2006-Dec. 2007)

- ◆ Compiled raw/statistical data to determine feasibility of numerous types of development. Conducted intricate field surveys of housing markets across the United States, Canada, and the US Virgin Islands.
- ◆ Interviewed local authorities to gather pertinent economic information regarding the housing market.
- ◆ Analyzed economic and socioeconomic factors to establish primary market areas. Critical to statistical relevance of data compiled.

CREDENTIALS

Chartered Financial Analyst (CFA)
Certified Financial Planner (CFP)
B.S., Economics: University of Colorado (2006)
The Columbus Academy (2002)
FINRA Series 65 License

GOVERNOR'S APPOINTMENTS TO BOARDS AND COMMISSIONS

Appointment Date: 5/9/2024

Name of Appointee: David S. Currier

Address: 2409 Dover Rd
Columbus, OH 43209
Franklin County
(H):
(W):
(M): 6149377685
(E): DavidSCurrier@gmail.com

Name of Commission: Bureau of Workers' Compensation Board of Directors
Joe Bizjack
(614) 728-0756
Maria Rossi
(614) 466-5223
30 W. Spring St
Columbus, OH 43215
(P): (614) 728-0756
(E): joseph.b.1@bwc.state.oh.us; maria.r.1@bwc.state.oh.us

Term Begins: 6/12/2024

Term Ends: 6/11/2027

Party Affiliation: Republican

Senate Confirmation: Appointed by the Governor, confirmed by the Senate

Financial Disclosure: Public disclosure required

Vice: David S. Currier