

SCOTT CHAMBERS

CURRICULUM VITAE

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McMinnville, OR 97128
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PROFESSIONAL EXPERIENCE

Headwater Investment Consulting, Inc

President and Founding Partner

McMinnville, Oregon

May 2004 – Present

Linfield College

Professor of Finance, Department of Business

McMinnville, Oregon

July 1990 – June 2013

Nottingham Trent University

Visiting Fellow of Finance, School of Business

Nottingham, England

August 1997 – June 1998

Linfield College

Vice President Finance and Administration

McMinnville, Oregon

January 1995 – May 1996

PriceWaterhouse Coopers, LLC

Staff Auditor

Los Angeles, California

July 1981 - June 1983

EDUCATION

University of California, Davis

Ph.D., Agricultural and Resource Economics

Davis, California

June 1988

University of California, Santa Barbara

B.A., Economics

Santa Barbara, California

June 1981

COURSES TAUGHT

Financial Management

Investments

Financial Theory

Futures and Options

Securities Markets

Financial Institutions

Corporate Finance

Public Finance

HONORS AND AWARDS

Edith Green Professorship awarded for outstanding teaching effectiveness, Linfield College

1994

EXTRACURRICULAR ACTIVITIES

Board of Trustees, Linfield College

2015 - Present

Director, First Federal Savings and Loan Association of McMinnville

2000 - Present

Chair of the Investment Committee, Ford Family Foundation

2010 - 2014

Rotary International, McMinnville Chapter

1995 - Present

Board Member, Legacy Health Systems Investment Committee

2002 - 2010

PRESENTATIONS AND PUBLICATIONS

- “Retirement Planning for Millennials: How to Convince Generation Y to Plan for Retirement,” a presentation given at the OSCPA Retirement Planning Conference. Portland, Oregon. November 7, 2012.
- “Economic Review and Outlook: 2011,” a presentation to The Oregon Bankers Association. Portland, Oregon. December 6, 2010.
- Conference Chairman, Foundation and Endowment Summit. San Francisco, California. October 16-17, 2006.
- “U.S. Endowments and U.S. Public Funds Use of Alternative Investments,” a presentation given at The Alternative Investments Summit. Half Moon Bay, California. October 12, 2005.
- “The Growing Role of the Chief Investment Officer,” a presentation given at The Bank of New York’s 2004 Higher Education Investment Officers Forum. New York. October 26, 2004.
- “The Importance of Endowment in US Private Higher Education,” a presentation given at The Masters of Indexing. Shanghai, China. October 15, 2004.
- “Alternative Investment Use in Higher Education Endowments,” a presentation given at The 2004 Western and Midwestern State Treasurers Conference. Jackson, Wyoming. September 13, 2004.
- “U.S. Endowments and U.S. Public Funds Use of Alternative Investments,” a presentation given at The Japan Cup of Investment Management. Tokyo, Japan. May 10, 2004.
- “Shrinking Endowment Payouts,” a presentation given at The Fall Investment Management Forum for Endowments and Foundation. Chicago. September 22, 2003.
- “Comparing Investment Allocations and Returns of Larger and Smaller Endowments and Foundations,” a presentation given at The Fall Investment Management Forum for Endowments and Foundations. Chicago. October 8, 2002.
- “What to do as the Portfolio Grows,” a presentation given at The Seventh Annual East Coast Endowment and Foundation Summit on Investment Management. New York. November 7, 2001.
- “What to do with the Next \$50 Million,” a presentation given at The Fifth Annual West Coast Endowment And Foundation Summit On Investment Management. San Francisco. June 19, 2000.
- “European Monetary Union and U.S. Investment Portfolios,” a presentation given at the annual meeting of the National Association of Personal Financial Advisors. Washington, D.C. June 4, 1999.
- “European Monetary Union: Understanding the Implications for Your International Portfolio,” a presentation given at The West Coast Endowment and Foundation Summit on Investment Management. San Francisco. June 28, 1999.

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- "The Smaller Endowment Perspective: Improving Returns by Indexing Efficient Asset Classes and Dedicating Limited Staff Resources to Alternative Investments," a presentation given at The Super Bowl of Indexing. Palm Springs, California. December 8, 1998.
- "European Monetary Union: Understanding the Implications for Your International Portfolio," a presentation given at The Fourth Endowment and Foundation Summit On Investment Management. New York. November 19, 1998.
- "The Applicability of an Index Approach for the Investment Management of U.S. Endowment Portfolios," a presentation given at The World Cup of Indexing and Related Products. Zurich, Switzerland. February 18, 1998.
- "The Applicability of an Index Approach for the Investment Management of Endowment and Foundation Portfolios," a presentation given at the Annual Research Forum. Department of Accounting and Finance, Nottingham Business School, Nottingham, England. January 19, 1998.
- "Exploring the Indexing Phenomenon: When, Why & How to Consider the Passive Approach," a presentation given The Third Endowment and Foundation Summit on Investment Management. New York. November 19, 1997.
- "Setting the Groundwork for Implementing an Effective Investment Management Program," a presentation given at The Second Endowment and Foundation Summit on Investment Management. New York. November 21, 1996.
- "Financial Derivatives: What Higher Education Administrators Need to Know," a presentation given at The Western College and University Business Officers Association 1996 Meeting. Palm Springs, California. May 1, 1996.
- "A Discrete Dependent Variable Approach to Predicting Success of Futures Contracts," by Scott Chambers and Arthur Havenner, paper presented at The Western Decision Sciences Institute 1992 Meeting. March 26, 1992.
- "Early Withdrawal from Tax Deferred Savings Plans," by Scott Chambers. *The Oregon Certified Public Accountant*. November 1991.
- "How to Use Tax Deferred Plans for Pre-Retirement Savings Goals," by Scott Chambers. *The New Mexico Business Forum*. Spring 1990.
- "U.S. Futures Exchanges as Nonprofit Entities," by Scott Chambers and Colin Carter. *Journal of Futures Markets*. February 1990.