

KULDIP K. AMBASTHA
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EDUCATION

UCLA ANDERSON SCHOOL OF MANAGEMENT

Los Angeles, CA

M.B.A., Emphasis on Finance

June 2011

- 3.70 total GPA. Coursework included Security Analysis & Investment Management, Behavioral Finance, Psychology & Personal Finance, Global Crisis of 2008-2009, Financial Markets, Financial Accounting, and Data & Decisions.
- Membership: Investment Finance Association, Entrepreneur Association, and Entertainment Management Association.

STANFORD UNIVERSITY

Stanford, CA

B.A. in Economics, Minor in Statistics

June 2004

- 3.64 major GPA. 3.52 total GPA.
- Leadership: The IndUS Entrepreneurs at Stanford (Co-Founder and Vice President, May 2002 - June 2004), the Stanford Pre-Business Association (Programming Director, Oct. 2002 - June 2004), and the Stanford Economics Association (Director, Oct. 2002 - June 2004).

EXPERIENCE

AMBASTHA FINANCIAL LLC

Mountain View, CA

President

Oct. 2018 - Present

- Provide investment management / advisory services, for individuals, high-net-worth individuals, and small businesses.
- Key focus is on portfolio management based on individual goals, objectives, time horizon, and risk tolerance of each client.
- Services include asset allocation, asset selection, regular portfolio monitoring, and other related items.

ASPIRIANT

Los Angeles, CA

Manager of Investment Strategy & Research

Mar. 2015 - Feb. 2018

- Researched various investment opportunities for inclusion in Aspiriant mutual funds (tickers: RMEAX, RMMBX, and RMDFX). Quantitative and qualitative factors involved in research, plus extensive in-person due diligence meetings.
- Participated in internal Investment Committee meetings during which high-level investment strategies and priorities were set.

STANFORD MANAGEMENT COMPANY

Stanford, CA

Senior Associate

Apr. 2012 - Feb. 2015

- Analyzed current private equity, natural resources, and real estate investments in Stanford University's endowment portfolio, providing relevant fund-level and portfolio company-level information to senior personnel.
- Ran and distributed quarterly reports for private equity, natural resources, and real estate in advance of board meetings.

CITIBANK

Long Island City, NY

Consumer Banking Summer Associate

June - Aug. 2010

CAMBRIDGE ASSOCIATES LLC

Menlo Park, CA

Senior Consulting Associate

Jan. 2007 - July 2009

Consulting Associate

June 2004 - Dec. 2006

- Counseled 10-15 colleges and universities, non-profit foundations, and high net-worth clients at any time, giving investment advice on \$23 billion in total assets. Required heavy client interaction, teamwork, and multiple deadlines.
- Conducted 3-month comprehensive review of large private K-12 school's endowment investments and spending history.
- Researched investment managers in various asset classes, both to suggest products for clients and to contribute to Cambridge's manager research efforts.
- Recruited for Menlo Park office Consulting Associate team. Vetted about 300 resumes a year, conducted on-campus interviews plus in-office follow-up rounds, and worked in a 5-person team of colleagues.
- Led educational sessions on philanthropy, networking, quantitative concepts, and Excel, in order to contribute to professional development. Trained new Consulting Associates on both qualitative and quantitative analyses used in client work.

ADDITIONAL

- Volunteer through Stanford Alumni Mentoring (June 2004 - onwards), counseling various Stanford undergraduate students.
- Member of the Los Altos Community Foundation's Development Committee (Nov. 2007 - Aug. 2009 plus Aug. 2019 - Present) in Los Altos, CA. Volunteer at Eastside College Preparatory School in East Palo Alto, CA (Sep. 2007 - June 2009).
- Interests include philanthropy, community service, reading history and biography books, autograph collecting, and exercise.