

David Hansen Chapman, CFA

191 64th Street, West Des Moines, IA 50266 | (515) 201-3088 | dchapman_11@yahoo.com

Education:

- **Doctor of Jurisprudence, Drake University** May 2009
- **Masters of Business Administration, Iowa State University** Dec 2008
- **B.S. in Finance, Minor in Marketing, Iowa State University** May 2005
 - Graduated with Distinctions

Certifications:

- **Chartered Financial Analyst**
- **Series 65, Registered Investment Adviser Representative**

Experience:

- **BTC Capital Management** Apr 2009 – Present
 - **Managing Director, Institutional Relationship Manager** June 2017 - Present
 - Responsible for Managing Relationships for Clients throughout United States including Institutional, Non-Profit, Pension, Trust and High Net Worth Clients
 - Responsible for Managing 401k Retirement Plan Client Relationships
 - **Equity Portfolio Management & Analysis** Jan 2012 – May 2017
 - Responsible for External Equity Manager Selection and Implementation for Multi-Manager Strategies
 - Exchange Traded Fund Manager Selection and Implementation
 - Mutual Fund Manager Selection and Implementation
 - Responsible for External Manager Selection for Client 401(k) Plans
 - Portfolio Manager for Small Cap Equity SMA Strategy
 - Equity Analyst for Large Cap Core/Value/Growth and International Equity SMA Strategies
 - Responsible for Client Meetings for Investment Management Clients
 - Includes Quarterly Client Meetings for Institutional, Non-Profit, Trust, and High Net Worth Clients Covering Strategy and Performance
 - Includes 401k Retirement Plan Clients Covering Manager Selection and Investment Offerings
 - Member of Asset Allocation Team Responsible for Making Asset Allocation Decisions for Firm's Investment Strategies
 - Responsible for Creation of Investment Policy Statements for Institutional, Non-Profit and 401k Investment Clients
 - **Fixed Income Portfolio Management & Analysis** Apr 2009 – Dec 2011
 - Managed Short Duration Taxable and Tax-Exempt SMA Strategies
 - Managed Intermediate Government SMA Strategy
 - Provided Credit Analysis for Fixed Income Securities

Activities:

- **Boys and Girls Clubs of Central Iowa, VP/Secretary of Board** Sept 2012 – Present
- **NAMI Greater Des Moines Advocate Circle** Jan 2017 - Present
- **Broadlawns Foundation Advocate Circle** 2011 – June 2016 (reached fundraising goal)

References:

- **Craig Johnson**, Managing Director-Investment Officer, Wells Fargo Advisors, 4344 Corporate Dr. Suite 100, W. Des Moines, IA 50266, 515-222-5267, craig.johnson@wellsfargoadvisors.com
- **Tom Mahoney**, Chairman and C.E.O. ITAGroup, 4600 Westown Parkway, West Des Moines, IA 50266, 515-771-3412, tmahoney@itagroup.com
- **Lynn Graves**, Community Leader & Former AVP Corporate Giving, Principal Financial Group, 515-991-3981, g1479@me.com