

MEIGHAN PHILLIPS

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Thorough and committed; demonstrated aptitude for both qualitative and quantitative analysis
Proven ability for building strong relationships and generating innovative solutions that achieve quantifiable results
Deliberate and thoughtful; formal leadership experience

EXPERIENCE:

THE PRINCIPAL FINANCIAL GROUP Des Moines, IA (Aug/06-Current)

Portfolio Manager – Principal U.S. Property Account (Mar/16 – Current)

Active participant in transaction review and analysis, assessing valuation and structure within the framework of the portfolio's strategic and tactical transaction requirements. Provides oversight for portfolio statistics and performance measures, including formal leadership of the portfolio analyst. Specialist in return attribution, partnering with the National Council of Real Estate Investment Fiduciaries to calculate and report fund level return attribution. Current member of the NCREIF Fund Index Governance Committee providing recommendations for and oversight of various Index considerations. Meets frequently with investment consultants, clients and banks, presenting portfolio performance and communicating the current investment environment and its impact on portfolio positioning. Ongoing responsibility for formal performance reporting including drafting commentary, partnering with marketing professionals and graphic designers and facilitating compliance and legal review within both Principal Global Investors and Retirement Investor Services.

Assistant Portfolio Manager – Principal U.S. Property Account (Apr/10 – Mar/16)

Responsible for portfolio statistics and performance measures, including formal leadership of the portfolio analyst. Responsible for formal performance reporting including drafting commentary, partnering with marketing professionals and graphic designers and facilitating compliance and legal review within both Principal Global Investors and Retirement Investor Services.

Portfolio Analyst – Principal U.S. Property Account (Aug/06-Apr/10)

Responsible for calculation and evaluation of statistics for the firm's flagship real estate product, the Principal U.S. Property Account. Analyzed risk/return opportunities at both the fund level and property level. Models employed in evaluation included fund level and property level return attribution, competitor risk/return and efficient frontier review and benchmark comparisons. Evaluated potential acquisitions and dispositions to determine overall return impact. Partnered with marketing team to fulfill client and consultant requests for information as well as to enhance marketing presentations to potential clients.

Acquisition Analyst (Apr/05-Aug/06)

Utilized Argus modeling software and Microsoft Excel to analyze potential asset acquisitions on the east region acquisition team in the markets of Washington, D.C., Atlanta and South Florida. Created new asset-specific Argus and Excel models to more accurately assess transactions and partnership structures. Accurately modeled multiple joint venture transactions and structures. Reviewed details of potential acquisitions with investment sales brokers in order to fully understand and effectively communicate details of potential acquisitions. Assisted acquisition manager in the training of new interns and created portions of a training program for interns.

Acquisition Analyst Intern

(Jan/05-Mar/05)

Trained with and assisted acquisition managers in reviewing possible transactions. Performed in the role of acquisition analyst through modeling transactions and presenting the results to corresponding acquisition managers. Worked with managers in all locations of the east region and by doing so, garnered a broad-based understanding of the major markets in which the firm chose to invest on the east coast.

EDUCATION:

THE UNIVERSITY OF IOWA

Master of Business Administration

Graduation Date: December 2008

DRAKE UNIVERSITY

Bachelor of Science in Business Administration in Finance with a concentration in Investments

Graduation Date: August 2006

INVOLVEMENT:

Volunteer and advocate for Youth Emergency Services and Shelter (YESS)

Member of United Way Emerging Leaders Initiative

Member of United Way Women's Leadership Connection

Member of Women's Network for Leaders, Principal Financial Group

Member of Sacred Heart Parish, West Des Moines

Past committee member for Variety, The Children's Charity: Golf Tournament and Polo on the Green