

MICHAEL P DICARLO

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Summary of Qualifications

High energy senior investment and management executive with extensive international and domestic experience. Successfully led worldwide equity investment team growing assets under management from \$300 million to \$25 Billion in five+ years driving market share, revenue and profit growth. Talent for taking available information and turning it into a rapid assessment of situational challenges and opportunities whether from an investment, operating or interpersonal perspective. Has excelled at communicating plans, theories and execution for media and client presentations. Key strengths include:

Account Development & Management
Wealth Introduction
Product/Brand Development & Creation
Market Communications

Strategic & Operational Planning
Multi-discipline Portfolio Management skills
Team Building & Retention
Channel Development & Management

Experience

ST ANDREWS GRAND - Providence RI
Partner

JAN 2006 - AUG 2007

In 2005, purchased and delivered Hamilton Hall in St Andrews, one of Scotland's most iconic buildings located directly behind the 18th green of the Old Course, to a Rhode Island developer. Helped and guided the developer through the national and local regulatory process without a single filed objection. Has relationships with many statutory groups that helped the developer move more expeditiously through the web of approvals necessary to get project off the ground. Accepted as local friendly and a trusted and respected outsider. Also responsible for greater than 1/3 of all membership sales.

CALEDONIA CAPITAL MANAGEMENT - Boston MA
Founder/Manager

JUN 1996 - DEC 2005

Successfully grew startup hedge fund operations to \$2.5 billion. Developed and implemented two funds, one driven by quantitative methodology. Flagship fund returned greater than 14% net return annually over ten years to investors. Cultivated an overseas investor group throughout Europe. Actively guided research and trading professionals. Served as primary contact with limited partners providing investment theory and strategy. Successfully projected in 1996 that the next leg of the bull market would be the single best opportunity to build wealth in the Nation's history.

JOHN HANCOCK MUTUAL FUNDS - Boston MA
Vice-Chairman of Investment Policy Committee
Chief Equity Officer
Director of Research
Fund Manager
Equity Analyst - London England
Equity Analyst

JAN 1983 - JUN 1996

JAN 1994 - JUN 1996

MAR 1993 - JUN 1996

JAN 1991 - JUN 1996

JAN 1988 - JUN 1998

MAY 1986 - NOV 1987

JAN 1983 - MAY 1986

Managed the most successful small capitalization growth mutual fund, The Special Equities Fund, in the United States over a ten year period. Created the firm's two quantitative funds, Special Opportunities and Asset Allocation. Was instrumental in growing fund assets from \$9 million to \$2 billion in just over ten years. Managed multi-national team located in USA, Europe & Asia. Was considered company's key spokesperson appearing numerous times on Wall St Week with Louis Rukeyser & CNBC. Was featured as the cover story subject in the New York Times Sunday Magazine. As Equity Officer and Director of Research built and grew professional organization that experienced virtually zero turnover over five+ years. Headed group growing equity assets from \$300 million to \$25 Billion in just greater than five years. Created the first dedicated internet analyst position in the United States in 1995.

Directorships

John Hancock Mutual Funds
ResumeCard Inc.
GenuOne Inc.

1996-1998

2000-2002

2002 -2006

Education

University of Massachusetts, Boston BA

1980

Referrals

Available upon request