



Oran A. Hall BA, FCSI, CIM, FMA
Senior Consultant

Oran A. Hall read for the Bachelor of Arts degree (Economics major) at the University of the West Indies and has since spent over twenty years in the investment industry including nine years managing the investment portfolios of large pension funds. He rose to the position of assistant vice president - investments of one of the then largest life insurance companies in the Caribbean.

Expertise

Among the areas in which he has worked are:

- Investment management
- Pension fund management
- Stockbroking
- Personal Financial Planning
- Fundraising
- Training

He has served as a director of Edward Gayle and Company Ltd. (now NCB Capital Markets Ltd.) Mr. Hall was responsible for setting up the Funds Management department of the former Mutual Life, assisted in the setting up and staffing of Edward Gayle and Company and set up major elements of the investment framework of Investment Management Ltd.

He currently lectures at the University College of the Caribbean in Financial Planning and Advising, has been publishing articles on investments, personal financial planning and pension fund management in local publications, and makes presentations at seminars on those subjects.

He is highly skilled in the following areas:

- Development of Investment Policy Statements
- Management of pension funds
- Securities trading
- Personal financial planning and counselling
- Product development
- Portfolio management
- Portfolio analysis and valuation
- Writing of pension, investment, compliance and personal financial planning literature and manuals

Mr. Hall is a Fellow of the Canadian Securities Institute (the premier qualification in the Canadian securities industry). He also holds the Certified Investment Manager and Financial Management Advisor designations from the Canadian Securities Institute.