

**SAMEER SOMAL, CFA, CAIA, CFP®**  
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## **EXPERIENCE**

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### **Blue Ocean Global Technology**

*Chief Financial Officer & Co-founder*  
*www.blueoceanlobaltech.com*

New York, NY  
September 2012 – Present

- Serves as primary expert witness and consultant for all corporate, political and government clients.
- Directs strategic planning, financial risk management, and key relationships.
- Oversees analysis and coordination of all Online Reputation Management (ORM) build, monitor and repair cases.
- Responsible for ORM suppression, legal, strategic, and expungement business development.
- Regular conference & private briefing speaker on the Digital Revolution, The Technology Planning Process, The Power of Social Media and Online Reputation Management.
- Recent digital presence and reputation leadership keynote presentations include: The Scotiabank Executive Strategy (Cayman Islands), CFA Institute community (Vietnam), LavaCon (Las Vegas) and Symmetry Partners (Puerto Rico).

### **Blue Ocean Global Wealth**

*Chief Financial Officer & Co-founder*

Washington, DC  
September 2012 – Present

### **iPlan Education Institute**

*Board Advisor*

New Delhi, India  
January 2013 – Present

### **Johns Hopkins University Carey School of Business**

*Speakers' Series*

New Delhi, India  
August 2013 – Present

### **R.J. Leonard Foundation**

*Board of Directors*

Doylestown, PA  
May 2015 – Present

### **Financial Planning Association**

*FPA Philadelphia Board of Directors, Audit & Membership Committee*

United States  
2011 – Present

### **Dundee Wealth US**

*Senior Investment Analyst, Investment Strategy Group*

Berwyn, PA  
July 2011 – September 2012

### **Merrill Lynch & Co. Inc.**

*Financial Advisor & Technology Intermediary*

Princeton, NJ & New York, NY  
September 2006 – November 2010

### **Morgan Stanley**

*Global Wealth Management – Analyst*

Doylestown, PA  
August 2005 – July 2006

### **Adviser Compliance Associates**

*Regulatory Associate*

Washington, DC  
July 2003 – February 2004

### **Smarter Campus, Inc. & Offish Aquariums Inc.**

*Founder and Managing Partner*

Washington, DC  
January 2003 – May 2005

## **EDUCATION**

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### **CFA Institute**

*Host of Topic @ Hand, Speaker, Board of Regents & Examinations Senior Grader,*

Charlottesville, VA  
2009 – Present

### **CFP Board**

*Council on Education, Women's Initiative (WIN) Advocate, CE Sponsor*

Washington, DC  
2009 – Present

### **Georgetown University, McDonough School of Business**

*Bachelor of Science in Finance and Accounting*

Washington, DC  
May 2005