

## **P. McCrady Gwinn**

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Greenville, SC 29607

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### **CURRENT ACTIVITIES**

#### **Instructor - 2017 to present**

#### **Adjunct Instructor - 2011 to 2017**

*University of South Carolina Upstate*

*Spartanburg, SC*

Recipient of 2014 - 2015 Bill Drake Outstanding Adjunct Faculty Member Award

#### **Adjunct Instructor - 2013 to 2020**

*Furman University* – day program and undergraduate evening studies

*Greenville, SC*

Recipient of 2019 Outstanding Faculty Member Award for Undergraduate Evening Studies

#### Courses:

- Business Finance
- Real Estate Finance
- Financial Statement Analysis
- Principles of Investments
- Financial Concepts for non-business majors
- Personal Finance
- Financial Accounting
- Managerial Accounting
- Leader of Jesse Bridges Investment Society (student managed portfolio, USC Upstate)

### **PROFESSIONAL EXPERIENCE**

#### **President - 2008 to 2022**

*Round Pond Capital*

*Greenville, SC*

- Consulted to develop asset allocation of portfolios.
- Concentrated on ETFs and dividend paying stocks.

**Chief Financial Officer - 1999 to 2008**

*Caine Company (Coldwell Banker Caine)  
Greenville, SC*

- Oversaw all financial activities and accounting department, supervised controller and six-member accounting staff.
- Member of Executive Committee that managed all affairs of the company and executed the business plan.

**Business Manager - 1992 to 1999 (full time) and 1999 to 2008 (part time)**

*Holder Investment Company, Holder Family Limited Partnership, and other related entities  
Pickens, SC*

- Managed business affairs for extended family
- Managed all investments (equities, fixed income and real estate)
- Managed closely held business interests
- Board member for various businesses
- Trustee for various trusts
- Personal representative for estates

**Trust Officer, Cost Accountant and Controller - 1982 to 1992**

- National Bank of South Carolina, Sumter, SC
- Coats and Clark, Toccoa, GA
- Aquenergy Systems, Greenville, SC

**EDUCATION**

**University of Georgia - 1981**

*Athens, GA  
MBA (Concentration in Finance)*

**University of South Carolina - 1980**

*Columbia, SC  
BS in Business Administration (Major in Insurance and Economic Security)*

**CURRENT BOARDS**

- Foothills Presbytery Finance and Stewardship Committee
- Foothills Presbytery Investment Committee
- United Ministries Board and Finance Committee

## **PAST BOARDS**

- Fourth Presbyterian Church Endowment
- Goodwill Industries Foundation
- Meals on Wheels Endowment
- Little Folks of Fourth Child Development Center
- East Broad Trust Company

## **LICENSES AND CERTIFICATIONS**

- Registered Investment Adviser - Series 65
- Quality Matters Online Teaching Certificate (2017)
- USC Upstate Online Teaching Certificate (2018)
- USC Upstate Hybrid Course Development Certificate (2019)