
Evan Schulz, Ph.D., CFA, CLP

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Experience

Managing Partner, *OSKR, LLC*, Emeryville, California (Current).

- Conducting financial and economic research to support a variety of clients and engagements, primarily in the area of intellectual property valuation and litigation consulting.

Founder, *Eurekanomics*, San Francisco, California (2007-2010).

- Retained as a financial damages expert for corporate litigation (cases identified below).
- Prepared patent valuations for tax filings and corporate out-licensing negotiations.
- Additional projects: damages analysis for intellectual property & antitrust attorneys; economics editor for a long/short hedge fund investor letter; consultant to high-net worth investors creating a corporate bond portfolio; market research and business plan support for prospective start-ups.

Associate, *Ocean Tomo*, Expert Services Practice, San Francisco, California (2005-2007).

- Performed intellectual property valuations for commercial infringement suits.
- Developed economic arguments with testifying expert witness, attorneys, and corporate clients.
- Directed analysts in all phases of project completion, including market/industry/product research, document and licensing agreement review, data management, and preparation of financial models.
- Drafted reports, rebutted opposing analysis, and prepared experts for deposition and trial.
- Cases included a patent dispute involving a specialty medical device worth \$2 billion in annual sales; less-invasive surgical technology worth \$200 million in annual sales; trademark infringement and false advertising claims on behalf of a sports equipment manufacturer; and a trademark infringement claim on behalf of a family-run producer of specialty animal feeds.

Research Consultant, *Wilshire Associates*, Santa Monica, California (2004).

- Conducted research and wrote white papers on alternative investments and absolute return strategies for institutional clients of the Funds Management Group and the Hedge Funds Group.
- Topics included the stand-alone and portfolio benefits and risks of absolute returns strategies, investable hedge fund indices, investable commodity indices, and managed futures indices.

Consultant, *Law and Economic Consulting Group*, Finance Practice, Emeryville, California (2001-2003).

- Teamed with senior staff and managed junior staff to complete consulting engagements; reviewed financial statements and legal documents to support federal tax submissions.
- Directed valuation of a \$2 billion municipal bond portfolio, which included serial fixed-rate, zero coupon, and convertible variable-to-fixed rate debt instruments.
- Valued a \$200 million private equity portfolio of real estate assets using comparable valuation method; ratio analysis relied on market value of invested capital to EBIT, to EBITDA, and to sales for a portfolio of publicly-traded comparable firms.
- Audited and helped to complete the valuation of a Fortune 100 company's foreign subsidiaries in preparation for their acquisition. Valuation of the \$500 million in assets relied on the sum of estimated discounted cash flows.

Research Associate, *Economic Strategy Institute*, Washington, D.C. (1999-2001).

- Delivered in-house and privately contracted studies, including regional macroeconomic surveys, global trade analysis, industrial sector analysis, and regulatory analysis for dissemination to corporate executives, government officials, and the public.
- In addition to published studies (listed below), projects included a review of Latin American tariffs on IT hardware, a survey of national strategies for allocating 3G wireless broadband spectrum, and legislative analysis of the proposed Broadband Internet Access Act of 2000.

Academic & Professional Training

Chartered Financial Analyst Designation, awarded September 2007 (Charter #95027).

Certified Licensing Professional, awarded August 2008 (Certification #2017)

Ph.D., International Relations, University of Southern California (1994-1999).

- Dissertation: *Risk, Uncertainty and the Transatlantic Formation of Agricultural Biotechnology Regulations*.
- Fields of specialization: international political economy, and international security.

M.A., International Relations, University of Southern California (1991-1993).

B.A., Political Science, *Magna cum Laude*, University of California at Berkeley (1985-1989).

- Minor, Classical Civilizations: history, religion, literature and art of ancient Greece & Rome.

Certificate in Finance, *with Distinction*, University of California Berkeley Extension (2001-2002).

- Financial engineering emphasis: derivative pricing models; hedging instruments and strategies.

Adjunct Professor, School of International Relations, University of Southern California (Fall 2003).

- *The Global Economy*, a lecture course for 70 undergraduate international relations majors. Topics included introductory economic theory and application, behavioral finance, capital markets, international trade, monetary systems, and the challenges of globalization.

Reader, Marshall School of Business, USC (Spring 1999).

Lecturer, Expository Writing Program, USC (1991-1993; 1995).

Teaching Assistant, School of International Relations, USC (1995-1997).

Expert Testimony (*client in italics*)

- *Steril-Aire, Inc. v. First Light Technologies, Inc. & UV Resources LLC & Forrest B. Fendl*. Case No. SACV 08-00682 AHS (ANx) (2009).
- *Litepanels, LLC & LitePanels, Inc. v. Gekko Technology Ltd. & David Amphlett*. Case No. 2-06cv-167 (2008).
- *B-K Lighting, Inc. v. Vision3 Lighting & Fresno Valves & Castings, Inc.* Case No. CV06-2825 MMM (PLAx) (2008).
- *UnionBanc Investment Services LLC v. Wachovia Securities, LLC et al.* Case No. CGC-07-463205 (2008).

Publications

- **Author**, *Automobile Retail and Production in the Age of E-Commerce*, June 2001, Economic Strategy Institute (ESI) Study.
- **Co-author with Peter Morici**, *Labor Standards in the Global Trading System*, January 2001, ESI Study.
- **Author**, "GMOs and the Global Trading System," *American Bankers Association Journal of Agricultural Lending*, Fall 2000, Volume 4, Number 1.
- **Contributor**, *Consolidation, Connectivity, Competition and Communities: The Advent of National Aviation Networks*, October 2000, ESI Study.
- **Author**, "Identifying Modified Foods without Scaring Consumers," July 13, 2000, *Bridge News*.
- **Author**, *The Opportunities and Hazards of Agricultural Biotechnology*, June 2000, ESI Study.
- **Co-editor with Clyde Prestowitz, Jr.** *The Networked Economy*, May 2000, ESI Study.

Public Presentations

- **Report Presentation**, *The Opportunities and Hazards of Agricultural Biotechnology*, June 2000, ESI.
- **Panelist**, “Genetically Modified Organisms and U.S. Trade,” February 2000, Congressional Economic Leadership Institute, Rayburn House Office Building, Capitol Hill.
- **Paper Presentation**, “Biological Weapons and the Recombinant DNA Controversy of the 1970s: A Case Study in Globalization,” April 1999, Center for International Studies.

Awards/Research Grants

Research Grant (1998), School of International Relations, University of Southern California.

Research Grant (1997), Center for International Studies, University of Southern California.

Teaching Award (1996), Center for Excellence in Teaching, University of Southern California.

Foreign Scholarship (1993-94), Konrad Adenauer Foundation, Bonn University, Germany.

Professional Affiliations

Licensing Executives Society

CFA Society of San Francisco

CFA Society of Los Angeles

Additional Skills

Some capacity for research in both French and German.