

## What we do

Fixed Income Live exists to bring transparency and education to the fixed income marketplace by:

1. Educating the fixed income investment community through our online Fixed Income Bond School
2. Enabling collaboration between market professionals, investors and industry experts
3. Providing current and relevant content for the fixed income investment community

## Company Summary

Fixed Income Live is an online video content studio dedicated to promoting financial education, transparency and collaboration to the fixed income investment community. By co-creating content with fixed income market professionals and investors, we deliver current, relevant, unbiased market insights and training and provide a platform as the collaborative voice of the fixed income markets.

## Management

Susan Munson, CEO, draws on her combined 20+ successful years of broad experience at leading Global Investment Firms to cultivate strategic solutions; and the practical experience as a Business Owner/Operator to establish the team and lead the development, vision and direction of Fixed Income Live. Charlene Frias, Chief Product Development Officer, spent the bulk of her financial career in Fixed Income Institutional Sales. Coupling her finance background with her internet production experience is key in equipping her to lead the product development of Fixed Income Live. Consulting Creative Director and Digital Strategist, Ruben Frias, is the former Creative Director of Walt Disney Interactive Media Group and brings 20 years experience implementing new media strategies for original content development. Doug Maxwell, a senior manager with over 20 years experience in program and project management for Fortune 500 financial services companies joins the team this summer as Chief Operating Officer.

Our Advisors, Investors and Instructors are leaders in their respective fields and either hold or have held high level positions in both business and government. David Horner, Chief Economist for Fixed Income Live, holds a Ph.D. in Economics and provides continuous "no-spin" commentary on the economic environment that combines rigorous academic training with 30 years of regulatory and trading desk experience. Prior to his 15 years with Merrill Lynch, David notably served as the Chief Economist and Research Director for the Commodities Futures Trading Commission.

To learn more about us visit: [www.fixedincomelive.com/our-team/](http://www.fixedincomelive.com/our-team/)

## Strategic Partner

Fixed Income Live partnered with the New England College of Business and Finance (NECB) to use their e-learning platform for the Fixed Income Live Bond School. Founded in 1909, NECB is a leading Boston based institution offering quality education to the undergraduate and graduate in addition the continuing professional education that is being offered

## Problem We Address

Emphasizing the need for fixed income education, the financial crisis that began in 2007 created a widespread call for change on Wall Street and in the financial regulatory system. In 2009, President Obama introduced a proposal that would eventually become the Dodd-Frank Wall Street Reform and Consumer Protection Act. Signed into law in 2010, the act increases the demand for specialized education in all financial transactions from the brokers to the buyers. The Fixed Income Live CFIP® program was created to supply the needed training highlighted in the Dodd-Frank Act.

## The Solution

Utilize technology to provide a more targeted, affordable educational solution. An online community where investors and professionals can interact in an open and transparent manner. An environment where investors are empowered with the confidence they need to know that they are asking the right questions.

## Bond School

Fixed Income Live is pleased to announce FIL Bond School and its Certified Fixed Income Practitioner (CFIP) Program. Offering 17 courses focusing on foundational bond market knowledge, the CFIP program equips students to evaluate investment options and strategies in a practical, straightforward manner. The courses are taught by leading experts with hands on experience and provide credits eligible for recertification of many commonly held designations. The coursework is currently being reviewed and we expect to become a credited CPE (Continuing Professional Education) provider for CPAs and others looking to satisfy annual CE requirements. The CFIP Program is offered at \$1500 per student. Multiuser licenses are available. To learn more about Bond School visit: [www.fixedincomelive.com/fil-bond-school-cfip-landing/](http://www.fixedincomelive.com/fil-bond-school-cfip-landing/)

## Target Market/Customers

Fixed Income Investors: *State & Local Governments*, Corporate Treasurers & Cash Managers, Community Banks & Credit Unions, Municipal Bond Investors, Pension Fund Boards. Fixed Income Professionals: Institutional Account Executives, Brokerage Firms, Traders, Compliance Managers, Auditors, CPAs, Economists. University Students and Professors

## Competitive Advantage

Strong Management Team with over 100 years combined Financial Services Experience. Unique, hands on experience working on the front lines with and for fixed income market investors. Skilled in emerging technologies.

## **Company Profile:**

### **Website**

**fixedincomelive.com**

### **Fixed Income Bond School CFIP Program**

**fixedincomelive.com/fil-bond-school-cfip-landing/**

### **Industry:**

**Financial Information Video Content/News & Education**

**Founded: 4/29/2010**

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## **Management**

**Susan Munson, Founder/CEO**

**Charlene Frias, Founder/CPDO**

**Doug Maxwell, COO**

**Ruben Frias, Consulting Creative Director/Digital Strategist**

## **Advisors:**

**Paul Cocking, Chief Portfolio Manager, Orange County, CA**

**Victoria Beatley, CFO, Mesa Consolidated Water District**

**Ray Stone, Ph.D., Co-Founder and Managing Director, Stone & McCarthy Research Associates**

**Bonny Schumacher, First Vice President, Morgan Stanley Smith Barney, Inc.**

## **Investors:**

**David Horner, Chief Economist, Fixed Income Live**

**Mariam Petruszak, Market Advisor**

**Tom & Maria Dailey, Creative Advisors**

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