

Paul B. Lewis

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Core Competencies

- In-depth knowledge of business, finance, and capital markets
- Proven ability to communicate effectively to a broad range of audiences
- Experience in partnering with financial, marketing, and design professionals to create communications that enhance client relationships and capture new business

Experience

Independent consultant and business writer, February 2004 to present

Clients include Putnam Investments, Harvard Business School, Morgan Stanley

- Collaborate with executives to articulate their views in high-visibility communications
- Create white papers, investment outlooks, newsletters, and marketing collateral that engage target readers and help build a brand
- Develop performance reports to investors

Select projects:

- White papers on commodities, emerging markets, alternative investments for high-net-worth investors; sponsored by Morgan Stanley, M&I Corporation
- Marketing collateral for Harvard Business School executive programs
- Corporate brochure for investment-management unit of Boston Private Bank

Vice President and Senior Financial Writer for Putnam Investments, 1997–2004

- Produced Putnam's single most widely distributed piece, showcasing insights of the firm's senior market strategists
- Wrote and edited marketing copy, research papers, and articles targeted to clients, partners, and prospects
- Created special communications on topics such as portfolio manager turnover, directed commissions, controls on trading costs
- Reported on investment performance to clients and distribution partners

Freelance Business Writer, 1994–1997; Clients included Fidelity Investments, Inc. Magazine, Banker & Tradesman

Commercial Loan Review Officer, Management Information Officer
Fleet Bank of Massachusetts/Bank of New England, 1988–1994

Commercial Loan Officer, Senior Financial Analyst
First City Bank of Houston/First City Bancorporation, 1981–1987

Education

M.B.A. with a concentration in finance, Rice University
B.A., Rice University
Series 6 certification, NASD (now FINRA)
Graduate-level coursework in business journalism, Boston University

Personal

Trustee, Babcock Manor Condominium Association
Community volunteer – Project Bread, United Way, AIDS Action Committee
Member, Brookline Chorus and Coro Allegro
Board member, Coro Allegro
Working knowledge of Spanish and French