

Adam E. Carlin

Senior Vice President—Investments, Senior Portfolio Manager
The Bermont Group, Smith Barney Citigroup, Coral Gables

Fiscally Focused

Downtime is something of a foreign concept to Adam Carlin. His self-imposed six-day workweek begins daily at 5:45 a.m., a pace that suits Carlin just fine. "My work is also my hobby," he says. "In terms of being balanced, my wheel may be broken, but that's not something forced upon me. I just love what I do." Carlin credits his work ethic to his grandfather, Harold H. Dubner, who passed away late last year. "My grandfather was an amazing man, one of those larger-than-life figures who taught me something new every day," Carlin says.

As senior portfolio manager and senior vice president—investments at Smith Barney, he has a direct role in the management of the \$1.5 billion his portfolio management group oversees. "It's fast-paced and very competitive," says Carlin, who works primarily with not-for-profit institutions and high-net-worth individuals, managing accounts that range in size from \$2 million to more than \$150 million. "Your best client is someone else's best prospect."

Since Carlin joined Smith Barney's Bermont Group straight out of UM, his own client list has swelled. "I started out at a desk with drawers that didn't open and no clients," he recalls. "But I worked hard and was fortunate early on in meeting two gentlemen active with the University of Miami, Albert Cohen and Irving Walkman, who became my mentors."

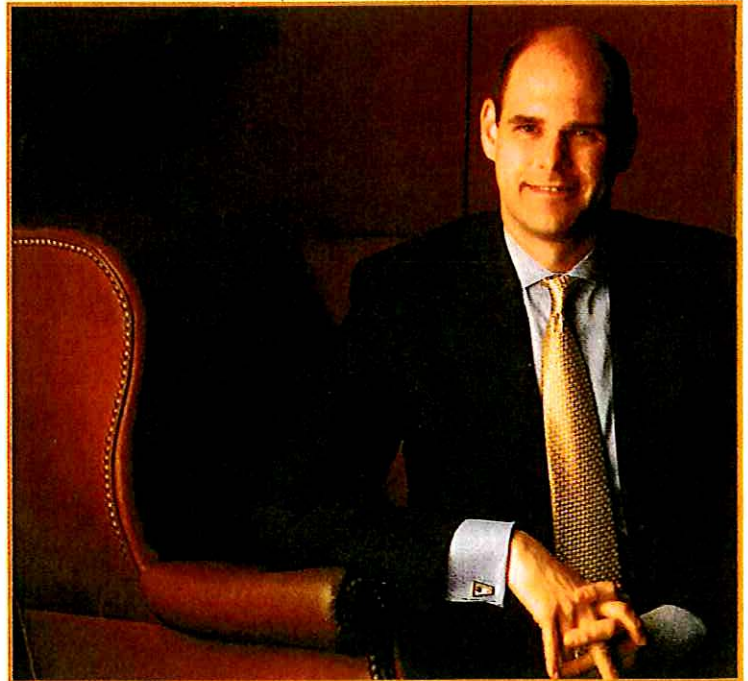
Today, Carlin works closely with his clients to develop personalized investment strategies that balance investment objectives with individual risk tolerances. "It's obviously lucrative work, but if you are good at what you do, you're also helping people reach their goals, from retirement to putting kids through college," he explains. "You work closely with people through good times and bad times and develop wonderful relationships."

He says his career was defined in many ways by the teachings of the late Finance Professor Lawrence Goldberg (*obituary, page 10*). "In addition to Dr. Goldberg's extraordinary knowledge and understanding of our banking system, it was his love of teaching that made him such a special professor," Carlin says.

Despite his nonstop schedule, Carlin found time to share his own knowledge and experience by teaching finance and portfolio construction courses at the School from 1999 through 2004.

"People measure being a successful person in different ways," he says. "One way is through success in the business world, but I view being involved in the community and in good causes as an equally important part of success."

— Jennifer Pellet



ments, at Citibank in Ft. Lauderdale, Fla. • **Andrea Ault** (BBA '96) has been accepted into Harvard University's PhD program in health policy. • **Lauren Camner** (MBA '98) was promoted to senior vice president of alternative delivery channels for BankUnited in Coral Gables. • **Paul O. Campbell**

JEFFERY SALTER