

UCI Wealth Management Center Picks New Director

FINANCE: Policano retiring after 13 years at business school

By PETER J. BRENNAN

Christopher Schwarz has been named director of the Center for Investment and Wealth Management at the University of California-Irvine, replacing Andy Policano.

“Chris has a terrific background in finance,” Policano said. “He has a great sense of what it takes to achieve financial wellness regardless of your income level. He’s a star in our classrooms, and he has lots of ideas.”

The center, which is part of the Paul Merage School of Business, annually sponsors programs to teach financial literacy.

This past month, it hosted 60 ninth- and 10th-graders from low-income families in weeklong programs called LifeVest that discuss issues like the basics of borrowing, the time value of money, and a lifetime savings plan.

The center has an annual budget of around \$200,000 and doesn’t receive funding from the school or government.

Rather, it accepts donations from many of its board members, who include prominent financial executives like Beacon Pointe Advisors co-founder Shannon Eusey and PAAMCO co-founder Jane Buchan.

Schwarz, who has been teaching at UCI since 2008, said he’s passionate about financial literacy. He said the program has taught 30,000 participants since beginning 11 years ago.

“My goal is to reach 300,000 people in the next 11 years,” he said. “I want to provide financial literacy that is needed at all levels of society.”



Schwarz: a passion for financial literacy

Prior to arriving at UCI, Schwarz earned his doctorate from the University of Massachusetts Amherst and was a visiting doctoral fellow at Yale University’s International Center of Finance. He received his bachelor’s degree from Babson College in Wellesley, Mass. He has published academic articles like “Mandatory Disclosure and Operational Risk: Evidence from Hedge Fund Registration,” which appeared in the 2008 issue of Journal of Finance.

Schwarz also previously wrote custom internet applications for medium-sized businesses.

Policano, who is widely praised for boosting the prestige of the business school during the nine years he was dean from 2004 to 2013, plans to retire from teaching this year.

“I’ve been working since I was 10, and I’m 68 now, so I think it’s time to retire,” said Policano, who said he intends to continue helping the center and volunteering on other boards. ■

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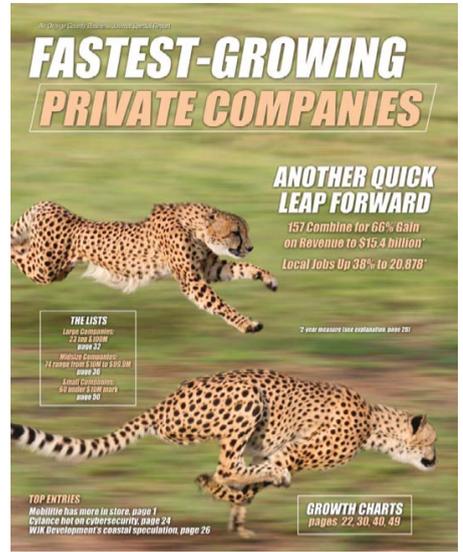
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