

# Philip A. Rahling

## Professional Experience

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**Stephen C. Baker, LLC**, Wayne, PA

January 2024 - Present

*Research Analyst*

- Play a key role in optimizing internal processes, overseeing day-to-day operations, and ensuring the seamless delivery of expert witness services, insurance law consulting, and mediation/arbitration services

**Hamilton Lane**, Conshohocken, PA

*Associate - Client Solutions Support*

December 2022 - July 2023

*Analyst - Client Solutions Support*

December 2020 - December 2022

- Coordinated completion for a variety of RFP, RFI, DDQ and other ad-hoc prospective investor and investor requests
- Managed quarterly marketing update by coordinating firm data including AUM, headcount and due diligence data
- Key contributor to several new business wins and client re-ups by supporting sales team
- Recognized by senior management with “Rock-On” client service award during January 2023 firmwide town hall

**FS Investments**, Philadelphia, PA

October 2019 - August 2020

*Analyst - Due Diligence*

- Collaborated within a small team and across the company to complete due diligence questionnaires in a timely manner for various broker-dealers, RIA's and wirehouses
- Facilitated and led quarterly conference calls with third-party due diligence firms
- Ensured all fund presentations were updated on a quarterly basis with accurate performance and strategy data

**Edelman Financial Engines**, Conshohocken, PA

July 2018 - October 2019

*Client Service Associate*

- Collaborated with financial advisors and colleagues in order to provide excellent financial services to the firm's clients
- Processed various client requests relating to asset movement and provided updates accordingly by phone and email

**Vanguard Group**, Valley Forge, PA

July 2017 - March 2018

*Brokerage Investment Professional*

- Utilized client relationship management skills to assist clients in a wide variety of account-related issues
- Communicated Vanguard's investment philosophy to clients during conversations pertaining to investment products and investment guidance

## Education

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**Muhlenberg College**, Allentown, PA

May 2017

- Bachelor of Science Degree in Finance with a Minor in Business Administration
- GPA; 3.31 Cumulative, 3.5 Major
- Awards & Recognition: Dean's List, Muhlenberg College Presidential Merit Scholarship, Men's Soccer Centennial Conference Champions

## Leadership & Volunteer Experience

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**Co-Captain**, Muhlenberg College Men's Soccer

Fall 2016

**Head of U.S. Equities**, Muhlenberg College Investment Society

Fall 2016 - May 2017

- Played key role in selecting securities and modifying asset allocation for a portfolio that outperformed the college endowment for the first quarter of the 2016 calendar year
- Presented the student-run investment portfolio to the Board of Trustees on behalf of the Investment Society

**Lehigh Valley TOPSoccer**, Allentown, PA

April 2014 - May 2017

- Educated and demonstrated the importance of meaningful participation in sports to children with disabilities

## Skills & Proficiencies

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- Proficient with DealCloud, Sharepoint, Salesforce, Qvidian, PowerBI
- Highly skilled with Microsoft Word, Excel, PowerPoint, Outlook, OneNote, Adobe Acrobat, Canva