

---

**Wensheng Cai, M.B.A.**  
**Senior Lecturer**  
**Finance and Marketing**  
**College of Business**  
[wcai@ewu.edu](mailto:wcai@ewu.edu)

---

---

## **Academic Background**

M.B.A. Gonzaga University, Spokane Washington, Master of Business Administration in Finance, 1994.

B.A. Fudan University, Shanghai, China, Bachelor Degree in Economics, 1991.

## **Certifications**

Charter Financial Analyst, 1997, International.

## **Memberships**

CFA Institute, 1994-present

CFA Society of Spokane, 1993-Present

## **SkillsPersonal**

Teaching Portfolio Management with hands-on investment stock research, market analysis and management of two actual stock portfolios;

Teaching Investment with a focus on stock valuations and student teams completing a stock research paper.

## **Computer Skills**

Word, Excel, PowerPoint

## **Work Experience**

### **Academic Experience**

Lecturer, Eastern Washington University (September, 2013 - Present), Spokane, Washington. As a lecturer of finance, I have taught various courses for undergraduate and graduate level. These include Investment, Portfolio Management, Derivatives and International Finance.

Quarterly Faculty, Eastern Washington University (September, 2011 - August, 2013), Spokane, Washington. As an Adjunct professor, I have taught Finance courses including Investment and Portfolio Management I, II, and III.

### **Non-Academic Experience**

#### **National**

Owner/Manager, Real Estate Investment (August, 2009 - August, 2013), Spokane, Washington. Owner and manager of a real estate investment firm specializing in multifamily / apartment real estate.

Research Analyst and Portfolio Manager, Ken Roberts Investments (April, 2002 - August, 2009), Spokane, Washington. Ken Roberts Investment is a large cap value asset manager with over \$300 million in client assets; the firm invests in US Stocks with S & P 500 as the bench mark index. The value approach employs fundamental individual stock research and historical valuation analysis. The research process for a stock involves extensive industry/sector analysis, conference calls with management, company competitive analysis, balance sheet and income statement modeling and forecast.

Research Analyst and Portfolio Manager, ICM Asset Management (February, 1994 - April, 2002), Spokane, Washington. ICM Asset Management is a small cap value asset manager with over \$1 billion in client assets;

the firm invest in the US stocks with Russell 2000 as the benchmark index; The value approach employs fundamental bottom-up stock research and valuation analysis. The research process for a stock involves extensive industry/sector analysis, management interview and site visits, company competitive analysis, balance sheet and income statement modeling and forecast.

## **Courses Taught**

**Courses from the Teaching Schedule:** Directed Study, Entrepreneurial Finance, Entrepreneurial Finance, Financial Decision Analysis, Financial Management, International Finance, International Financial Management, Investments, Portfolio Management I, Portfolio Management II, Portfolio Management III, Short-Term Financial Management

**Courses taught, but not in the Schedule:**  
FINC438 Entrepreneurial Finance

## **Other Teaching Activities**

### **Student Assign-Supervised Research (UG)**

2018 - Student research team advisor for the Annual CFA Research Challenge. 5 students. Student Assign-Supervised Research (UG).

## **Intellectual Contributions:**

### **Service:**

## **Service to the University**

### **Department Assignments**

#### **Faculty Advisor:**

2018-2019: Portfolio Manangement

2017-2018: Investment management: Wynd Portfolio and Student Investment Program

## **Service to the Community**

### **Support/Direct Student/Class Community Project**

2018: EWU CFA Research Team, I have served as a faculty advisor for the EWU CFA Research Team each year in the fall quarter since 2010. The EWU Team participates in the annual International CFA Research Challenge.

The challenge begins in early November each year and concludes in late February the following year. As an advisor, I meet with the team once a week during the period, engaging them toward completing a full comprehensive stock research paper based on the standard by the CFA Institute.