

CHARISSE CONANAN JOHNSON, CFA

EXECUTIVE THOUGHT LEADER & ACTIVATOR

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SUMMARY

Transformational leader and wealth strategist with deep expertise in entrepreneurship, U.S. equities, and social capital. Best-selling author, dynamic speaker, and media personality dedicated to inclusive wealth-building strategies for individuals, organizations, and communities. Proven track record in growing companies, securing multi-million-dollar client opportunities, and driving systemic change through cross-sector partnerships.

EDUCATION

Master of Business Administration, Entrepreneurship and Strategic Management
UNIVERSITY OF CHICAGO
2008-2010

Bachelor of Arts, Economics and American Studies
YALE UNIVERSITY
1998-2002

SKILLS

|| PROFESSIONAL

- Executive leadership
- Published writing
- Board governance
- Impact-driven solutions
- Strategic planning
- Capital raising
- Small business research

WORK EXPERIENCE

FOUNDER AND CEO

Charisse Says, Charlotte, N.C. | 07/2014 – Present

- Created CharisseSays.com to empower individuals, especially women, in achieving long-term wealth goals through credible, informative, and inspiring approach.
- Distributed content from the best-selling book, *A Wealthy Girl: 7 Steps to Prosperity, Peace, and Personal Power*.
- Provided strategic consultative services on increasing constituency wealth to over 25 financial, academic, and non-profit institutions.
- Disseminated wealth resources through a newsletter to over 3,000 subscribers.
- Delivered dynamic keynote engagements with marquee clients, including Google, BCG, and Clayco, achieving 4.8/5 rating on all engagements.
- Produced highest brand ambassador revenue for SoFi over a 12-month period, generating over \$10 million in new loan activity.
- Featured as a financial expert on TD Ameritrade, FOX News Chicago, Experian, Huffington Post, and American Express OPEN Forum.

CO-CEO

Next Street, Charlotte, N.C. | 03/2020 – Present

- Increased revenue by 150% from \$6M to \$15M in 3 years, growing full-time employees from 30 to 70, and contractor workforce from 10 to 40.
- Activated multi-million-dollar balance sheet restructuring to become employee-owned and majority female-owned company.
- Developed new strategic vision, mission, and values, transitioning business model to long-term, multi-year recurring contracts through scalable tech-enabled solutions.
- Established inaugural client relationship with Cook County Bureau of Economic Development, resulting in \$6M in revenue and the nationally recognized Source Program, serving over 67,000 businesses with education and \$67 million in capital.
- Distributed over \$2.5 billion in institutional and federal capital to over 1 million small business owners during the COVID-19 pandemic to prevent closures, pivot business model, and grow revenue.
- Initiated anti-racism efforts, increasing firm composition from 47% People of Color in 2021 to 63% in 2024, and achieving gender pay parity.

PARTNER, HEAD OF CONSULTING PRACTICE

Next Street, Chicago, I.L. | 04/2017 – 03/2020

- Managed P&L for \$5M business line, improving operating margin from 12% to 18%.
- Led a team of 20 advisors in developing strategic growth plans for large-scale inclusive economic development and outcome-drive community investment efforts.
- Developed breakthrough scalable place-based small business research solution applied in 25+ U.S. markets, securing the firm's first million-dollar corporate consulting client.

DIRECTOR, CHICAGO MARKET LEAD

Next Street, Chicago, I.L. | 12/2015 – 03/2017

- Spearheaded expansion in Chicago as first market employee and launched office.
- Grew Chicago revenue from \$500K to \$2.5 million in two years and grew team to eight.
- Secured high-profile clients including The Obama Foundation, The MacArthur Foundation, World Business Chicago, and JPMorgan.

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ACHIEVEMENT

ROBERT TOIGO FELLOW & ALUM
ROBERT TOIGO FOUNDATION
12/2008 - Present

WALLMAN FELLOW
FULL TUITION SCHOLAR
UNIVERSITY OF CHICAGO
09/2008 - 06/2010

CHICAGO CONVERSATION AWARD
AWARDEE FOR POSITIVE IMPACT
ON CHICAGO AMONGST PEERS
08/2012

CHARTERED FINANCIAL ANALYST
CHARTERHOLDER
CFA INSTITUTE
12/2006

AWARDS

UNIVERSITY OF CHICAGO
POLSKY CENTER
ENTREPREURSHIP AWARD
5/2010

VOLUNTEER

**General Partner and
Investment Committee**
BULLDOG INNOVATION GROUP
12/2015 – Present

SELECT PUBLICATIONS

**"America's New Industrial
Revolution is Creating a
Procurement Economy"**
Fortune
10/2023

**"Women of Color Face
Structural Barriers Hardly
Mentioned in Sheryl
Sandberg's Best Seller"**
Chicago Crain's Business
06/2022

***A Wealthy Girl: 7 Steps to
Prosperity, Peace, and
Personal Power***
Networkding Publishing
02/2021

WORK EXPERIENCE – CONTINUED –

DIRECTOR

Chicago Infrastructure Trust, Chicago, I.L. | 12/2014 – 8/2015

- Cultivated relationships with over 200 government, community, and industry stakeholders to facilitate public-private partnership agreements and oversee project activities at the U.S.'s inaugural municipal infrastructure bank.
- Oversaw the \$150 million FITHomes initiative, a sustainable market-rate solution aimed to build 1,000 homes on vacant lots in Chicago over a decade, generating 5,000 new jobs.
- Spearheaded a \$20 million Compressed Natural Gas (CNG) project aimed at establishing a network of CNG stations to reduce fuel expenses and align with policy goals, achieving an expected return on investment of over 25%.

FOUNDER AND CEO

Smarteys, Inc., Chicago, I.L. | 06/2010 – 08/2014

- Founded personal fintech platform targeting Millennials to enhance their savings, minimize debt, and make tailored recommendations on how to spend money.
- Secured \$300,000 in seed funding through a strategic capital raise.
- Provided business intelligence for product development builds, oversaw financial statements and managed 30+ strategic partnerships to drive business success.

VICE PRESIDENT, U.S. EQUITY RESEARCH | ASSOCIATE | ANALYST

JPMorgan Investment Management, New York, N.Y. | 05/2002-06/2008

- **Vice President, US Equity:** Oversaw 18% of the \$10.4 billion mid-cap value fund, producing 25+ proprietary research reports. Established robust relationships with C-suite management teams of portfolio companies from \$1-\$10 billion in market cap.
- **Associate, US Equity:** Implemented 6-8 investment ideas annually through meticulous analytical review. Supported portfolio team in executing trades and overseeing daily cash inflows of \$15 million.
- **Analyst, US Equity:** Developed final presentations securing \$38 million in assets for long/short strategies. Analyzed performance history, volatility, risk-adjusted returns, and investment objectives of multi-million institutional equity portfolios.