

# Kevin D. Freeman, CFA

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## EXECUTIVE PROFILE

Kevin D. Freeman is considered one of the world's leading experts on financial terrorism and economic warfare. He has written extensively on the subject including authorship of a New York Times best-selling book, the cover story for American Legion magazine and featured stories for multiple issues of The Counter Terrorist. He has been featured on CNBC, Fox News, The Blaze, and dozens of television and radio programs. He is CEO of Freeman Global Holdings, LLC and president of Cross Consulting and Services, LLC. Kevin is also the host of a television program, *Economic War Room with Kevin Freeman*.

Through Freeman Global Investment Counsel, an independent money management firm specializing in global equities, the firm serves high net worth investors and institutional clients. The firm also serves as a strategic consultant regarding the global financial industry including an expertise in economic warfare, financial terrorism and economic risk analysis. Clients include government contractors, financial services firms, technology companies, and various others. Mr. Freeman participated in multiple Department of Defense studies including a proprietary work on Economic Warfare prepared for SOLIC. He has participated in economic war games and briefed various agencies including DIA, FBI, ONA (Office of Net Assessment), DARPA, IARPA, as well as multiple members of the House and Senate.

Prior to developing his own firm, he submitted a business plan in 1990 to Sir John Marks Templeton and Templeton, Galbraith and Hansberger regarding a new company, *University Investment Management*, later serving as one of the first employees. Ultimately, as Managing Director, he headed the division managing nearly \$2.5 billion (renamed *Templeton Portfolio Advisory*), as the private client group of *Franklin Templeton*. Over the past three decades, he has served as Portfolio Manager, entrepreneur, management executive and consultant. Freeman holds a CFA designation and has held Series 6,7,24, 63, and 65 securities licenses.

## PROFESSIONAL BACKGROUND

**Host** *Economic War Room with Kevin Freeman* Irving, Texas 2018- Present  
Economic War Room is the first and only television program focused exclusively on the intersection between National Security and America's economy. Short segments of the program are featured weekly in local news broadcasts on over 100 stations covering most major markets. Full programs will soon debut on [www.economicwarroom.com](http://www.economicwarroom.com).

**CEO** *Freeman Global Holdings, LLC, Cross Consulting and Services, LLC* Keller, Texas 2004- Present  
Strategic Consulting services for government contractors, financial services firms, technology companies, and various others with specialties in threat finance, global investing, and asset management. Provides wealth management for high net worth and institutional investors.

**Founder** *NSIC Institute* Bartlesville, Oklahoma 2014 – Present  
The *National Security Investment Consultant Institute*, housed at Oklahoma Wesleyan University promotes awareness about the reality and risks of economic warfare, equips leaders to enhance national security, works to protect the American economy, and trains advisors and investors to improve investment results.

**Chairman** *Separate Account Solutions, Inc.* Dallas, Texas 2000- 2004  
Co-founded and developed Separate Account Solutions, Inc., providing wealth management solutions to innovative financial services companies.

**Managing Director** *Templeton Franklin Investment Services, Inc.* Carmel, California 1991 - 2000  
Wrote an original business plan in 1990 at the request of Sir John Templeton and was hired in 1991 to help create and grow what became the Private Client division as *Templeton Portfolio Advisory*. Prior to becoming Managing Director and heading the division in 1999, served in all major capacities ranging from Associate Portfolio Manager, Portfolio Consultant, Director of Portfolio Consulting, and co-developer of the Portfolio Operations Group.

**Chief Investment Officer** *Capitalist Publishing Co., Inc* Tulsa, Oklahoma 1981 – 1991  
Provides research, market commentary, and oversight of Portfolios for The Personal Capitalist investment newsletters (since 1985) targeted to high-net-worth individuals and featuring highly successful Model Portfolio and Small-Position Portfolio. Served as researcher for The Doughty Report (also published by Capitalist Publishing Co., Inc. from 1981-1985).

## **EDUCATION**

**B.S., Business Administration** *University of Tulsa* Tulsa, Oklahoma 1983  
Graduated with highest honors and served as the school's Rhodes Scholar nominee in 1983 (achieved state finalist distinction). Qualified for both a BS in Business Administration as well as a BS in Economics through the School of Arts and Sciences.

## **Partial List of PUBLICATIONS**

“Game Plan: How to Protect Yourself from the Coming Cyber-Economic Attack.” Regnery, Washington, DC, January 2014, 300 pages. This book was ranked #1 in multiple Amazon categories following its release..

“Secret Weapon: How Economic Terrorism Brought Down the U.S. Stock Market and Why it Can Happen Again.” Regnery, Washington, DC, January 2012, 287 pages. This book reached New York Times best-seller status for all non-fiction books its first month of release and was at one point ranked in the top 10 for all books sold by Amazon.

“Putin's Reset: The Bear is Back and How America Must Respond.” Center for Security Policy, Washington, DC, November 1, 2016. Co-authored with Fred Fleitz, Stephen Blank, Frank J. Gaffney Jr., Daniel Goure, Cliff Kincaid, Roger W. Robinson Jr., David Satter, Mark B. Schneider, and J. Michael Waller.

“Warning Order: China Prepares for Conflict, and Why We Must Do the Same.” Center for Security Policy, Washington, DC, May 16, 2016. Co-authored with Fred Fleitz, Sen. Jim Talent, Gordon G. Chang, Dean Cheng, Frank J. Gaffney Jr., Bill Gertz, Adm. James "Ace" Lyons Jr., Dr. Peter Navarro, and Lindsey Neas.

“The Secure Freedom Strategy: A Plan for Victory Over the Global Jihad Movement” Center for Security Policy, Washington, DC, January 28, 2015. Written as a member of The Tiger Team: Lt. General William G. Boykin (ret.), Ambassador Henry F. Cooper, Fred Fleitz, Kevin Freeman, Frank J. Gaffney, Jr., Dan Goure, John Guandolo, Jim Hanson, Brian Kennedy, Admiral James A. “Ace” Lyons (ret.), Clare Lopez, Joseph E. Schmitz, Tom Trento, J. Michael Waller, Tommy Waller, David Yerushalmi, Esq.

“The Report No One Wanted to Hear,” The American Legion Magazine April 2012. This was the cover story in a publication with more than two million subscribers.

“Islamist Economic Warfare,” The Counter Terrorist, April/May 2012. Wrote a cover story for the Journal for Law Enforcement, Intelligence & Special Operations Professionals.

“Is China at War with the U.S.A.,” The Counter Terrorist, August/September 2011. Wrote a cover story for the Journal for Law Enforcement, Intelligence & Special Operations Professionals.

“Economic Warfare: Risks and Responses, Analysis of Twenty-First Century Risks in Light of the Recent Market Collapse.” June 2009. This 102-page report reviewed in detail the background and timeline of the 2008 market collapse and provides and supports a hypothesis that the collapse was a targeted result. The report identifies specific vulnerabilities that may have led to an economic attack. The report also provides detailed insight into potential suspects using a motive, means, and opportunity methodology. It further identifies future risks and provides specific policy recommendations designed to reduce those risks.

“Economic Warfare Threat Exposed by Recent Market Turmoil,” December 2008. This white paper was prepared for a group within DoD and had wide circulation among the defense and intelligence communities. It identified specific potential economic vulnerabilities and discussed the risks of financial terrorism.

“Investing in Separate Accounts.” *McGraw-Hill*; New York, NY, March 2002, 253 pages. This is the first book ever published for investors in the rapidly growing separate account industry. The book was co-authored with Erik Davidson.

"Online Asset Management." *The E-Finance Report*. McGraw Hill, New York, NY, March 2001, pages 213-229. This chapter in a book compiled by Ezra Zask covers the future of separate accounts in an online investment environment.

"A Common-Sense Guide to Investment Profits." *Capitalist Publishing Company*, Tulsa, OK, September 1986. Educational primer for those interested in beginning stock portfolios.

"Sizing Up the Separate-Accounts Opportunity." *Wall Street and Technology*, July 17, 2002. Contributed article co-authored with Erik Davidson and Steve Schwarzbach.

"For Mutual Fund Companies, Separate Accounts Aren't a Luxury – They're a Necessity." *SMA Forum (formerly Kings of Wrap)*, July 2001. Contributed article co-authored with Erik Davidson.

"Fund Companies Face Uphill Battle in Separate Accounts – But It's Worth the Climb." *SMA Forum (formerly Kings of Wrap)*, July 2001. Contributed article co-authored with Erik Davidson.

"Keys to Success: Seven Steps Mutual Fund Firms Must Take to Succeed in Separate Account Marketplace." *SMA Forum (formerly Kings of Wrap)*, October 26, 2001. Contributed article co-authored with Erik Davidson.

### **TRAINING / CREDENTIALS**

- *Chartered Financial Analyst* (1997 to present) - *CFA Institute*, 1995 - 1997. Self-study program following prescribed curriculum. Successfully passed three consecutive annual tests.

### **LICENSES**

- Held series 7, 24, 63, 65 - NASD, 1991 - 2000. Registered Representative, Registered Principal, and Registered Investment Advisor representative with *Templeton Franklin Investment Services, Inc.*

### **HONORS**

- *Who's Who in America* - Marquis Who's Who Publications Board, 2000 – 2006
- *Who's Who in Finance and Industry* - Marquis Who's Who Publications Board, 2000 – 2006
- *Who's Who in the World* - Marquis Who's Who Publications Board, 2000 - 2006

### **AFFILIATIONS**

- CFA Charterholder and Member of the CFA Institute (formerly *Association for Investment Management and Research*), 1997 – present.
- Cherokee of mixed-blood and a citizen of the Cherokee Nation of Oklahoma as a proven descendant of ancestors referenced on the Dawes Commission Rolls.
- Co-founder and Chairman – *The Adam Smith Foundation*, Tulsa, Oklahoma, 1989 - 1993. Nonprofit foundation promoting practical free enterprise (entrepreneurship and investment) education on college and university campuses. Coordinated the presentation of the 1990 *Adam Smith Award for Individual Excellence in Free Enterprise* to Sir John Marks Templeton, the 1991 *Adam Smith Award* to former President Ronald Reagan; presented the 1995 award to Jack Burns, the 1996 award to William F. Buckley, Jr., and the 1999 award(s) to Dave Thomas and Steve Forbes. Other recipients include the Honorable William E. Simon, Foster Friess, and Philip Anschutz. The Foundation was placed at Hillsdale College in 1993.
- Senior Fellow– The Center for Security Policy, 2012 - Present
- Trustee – Oklahoma Wesleyan University, 2012 – Present

- Contributing Editor– The Counter Terrorist magazine 2013 - 2015
- Member - *International Society of Financial Analysts*, 1997 – 1998
- Associate - *Hillsdale College*, Hillsdale, Michigan, 1996 – present
- Public Policy Expert (Economics) - *Heritage Foundation*, Washington, DC, 1990 – 1992
- Member - *Economic Development Board*, City of Keller, Texas, 2003-2004
- Advisory Board Member – *First Liberty* (formerly *Liberty Institute*), Dallas, Texas, 2003 – present
- Director, *Galectin Therapeutics*, Norcross, Georgia, 2011 - present
- Selected as Rhodes Scholar candidate to represent the University of Tulsa, 1984 (did not receive the scholarship but was a State finalist)
- Member of or selected to the following honor societies: *Pi Gamma Mu*, *Beta Gamma Sigma*, *Phi Gamma Kappa*, *Scroll*, *Mortar Board*, *Omicron Delta Kappa*, *Pi Sigma Alpha*.