SAMIR HODZIC

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PROFESSIONAL EXPERIENCE

Premier Investments, LLC | New York, NY | July 2026 - Present

Director, Private Wealth & Institutional Distribution

- Lead private wealth and institutional sales and distribution for a diversified platform of alternative and traditional investment strategies, with responsibility for capital formation, new investor relationships, and expanding assets across key wealth and institutional channels.
- Drive capital formation and new business development across RIAs, family offices, private banks, broker-dealers, wealth management platforms, and institutional investors.
- Develop and manage relationships with financial advisors, investment consultants, family offices, endowments, foundations, pensions, and other sophisticated allocators.
- Represent differentiated alternative and traditional investment strategies, translating investment opportunities into compelling portfolio solutions for advisors and institutional investors.
- Partner directly with asset managers on go-to-market strategy, investor positioning, fundraising initiatives, territory development, and distribution planning.
- Lead the full investor engagement cycle, including prospecting, portfolio and strategy discussions, due diligence meetings, educational presentations, conferences, and ongoing relationship management.
- Leverage deep alternative investment and wealth management experience to help investors evaluate strategies within broader portfolio construction, asset allocation, and diversification objectives.
- Identify and develop new distribution channels, strategic partnerships, and investor relationships to drive net new assets and expand market penetration.
- Serve as a strategic bridge between investment managers and the private wealth and institutional marketplace, providing market intelligence, investor feedback, and insights that inform fundraising and distribution strategy.

Morgan Stanley | New York, NY | August 2022 - June 2026

Vice President, Alternative Investments - Strategy & Investor Solutions

- Led strategic initiatives to enhance the firm's Alternatives platform, improving product accessibility, operational efficiency, and advisor engagement across Private Equity, Private Credit, BDC's, Infrastructure, Real Estate, Hedge Funds, and Digital Assets.
- Acted as a trusted subject matter expert on Alternative Investments, advising Financial Advisors, including the Top 100 teams and multiple Barron's Top 10 teams, and clients on private markets strategies across Wealth Management, Private Wealth Management, and Institutional channels.
- Built and managed relationships with fund sponsors, administrators, and internal stakeholders to drive product innovation, expand distribution, and enhance platform capabilities.
- Led the development of advisor and client-facing materials, presentations, and communications, translating complex investment strategies into clear, actionable insights aligned with product strategy and market dynamics.
- Designed and delivered training programs and launched an internal alternatives platform, reaching all Morgan Stanley Financial Advisors and significantly improving advisor knowledge, engagement, and adoption of alternative investment solutions.
- Analyzed market trends, advisor feedback, and competitive dynamics to identify growth opportunities, enhance product offerings, and inform strategic decision-making.
- Partnered cross-functionally to resolve complex issues and optimize platform capabilities, improving the overall advisor and client experience.
- Recruited, mentored, and developed team members, implementing data-driven performance metrics to drive accountability, growth, and continuous improvement.

Blackstone | New York, NY | June 2021 - August 2022

Assistant Vice President, Secondaries - Private Equity & Real Assets | 2021 - 2022

- Supported the execution of over $5bn in secondaries transactions across private equity, infrastructure, and real estate, partnering with investment teams, legal counsel, and external stakeholders to drive transactions through closing.
- Identified and implemented process improvements and automation initiatives that enhanced efficiency, reduced execution risk, and streamlined investment workflows.

Morgan Stanley | New York, NY | September 2014 - June 2021

Assistant Vice President, Institutional Consulting - Alternative Investment & Platform Strategy | 2019 - 2021

- Served as a key alternatives subject matter expert supporting institutional clients, including pensions, endowments, foundations, OCIOs, and family offices, advising on platform capabilities and investment implementation.
- Drove enhancements to the Institutional Advisory platform, leading cross-functional initiatives to improve system integration, data quality, and overall user experience across Salesforce, Aladdin,

Addepar, Clearwater Analytics, PARis, and PFaroe.

- Scaled platform operations supporting 50+ institutional consulting teams, including multiple Barron's Top 20 teams, managing forecasting, onboarding, and operational workflows to improve efficiency and execution across the institutional business.

Associate, Institutional Consulting - Platform Strategy & Operations | 2018 - 2019

- Served as a key liaison between Graystone institutional consulting teams and internal stakeholders, supporting 50+ institutional consulting teams across a national platform and driving alignment across front and back office functions.
- Designed and delivered training materials and workshops for institutional teams, improving adoption of platform tools and increasing operational efficiency.
- Analyzed institutional fee structures across client relationships to ensure alignment with firm policies, pricing guidelines, and competitive standards.

Analyst, Institutional Consulting - Platform Operations & Risk Management | 2016 - 2018

- Supported a multi-year risk and compliance initiative across a national institutional platform, coordinating the documentation, tracking, and oversight of 5,000+ alternative investments across 50+ institutional business teams and an institutional client base including pensions, endowments, and foundations.
- Managed monthly reconciliation and processing of 60+ third-party vendor payments across institutional and corporate business lines, ensuring accuracy, consistency, and adherence to internal controls.
- Developed and delivered front and back-office training materials and workshops for institutional teams, providing guidance and mentorship to 300+ employees and improving platform adoption and operational efficiency.

Supervisor, Alternative Investments - Operations & Team Leadership | 2016

- Served as a key liaison between senior management, Financial Advisors, third-party vendors, and clients, coordinating across Wealth Management, Private Wealth Management, and Institutional channels to streamline alternative investment processes and enhance execution across a high-volume alternatives platform supporting a diverse client base across wealth and institutional channels.
- Led and developed a team of professionals, delivering training and performance management that drove achievement of weekly and monthly targets and improved key performance metrics by up to 50%.

Analyst III, Alternative Investments - Product Operations & Platform Execution | 2015 - 2016

- Managed operational workflows for high-volume private equity and real estate fund products, supporting 10,000+ client accounts across a high-volume alternatives platform, including leading managers such as Blackstone, BlackRock, Neuberger Berman, Hamilton Lane, and Citigroup, as well as customized solutions supporting ultra-high-net-worth and institutional clients.
- Executed core investment lifecycle processes, including client subscriptions, position transfers, and account-level analysis, ensuring accurate fund onboarding and ongoing performance across complex alternative investment structures.

Analyst II, Alternative Investments - Controls & Product Operations | 2014 - 2015

- Collaborated as part of a 10-member control team to review and enhance business control functions across multiple alternative investment product teams, strengthening adherence to firm and regulatory standards.
- Processed 100+ weekly client subscription and redemption transactions across alternative investment products, maintaining accuracy and consistency within a high-volume operational environment.

EDUCATION

Iona University - Hagan School of Business, New Rochelle, NY: 2014
Master of Business Administration - Corporate Finance
Iona University - Hagan School of Business, New Rochelle, NY: 2013
Bachelor of Business Administration - Management

ADDITIONAL CREDENTIALS

Licenses & Registrations: Securities Industry Essentials (SIE) / FINRA Series 7 - General Securities Representative / NASAA Series 63 - Uniform Securities Agent

Technical Skills: Microsoft Office Suite (Word, Excel, PowerPoint, Outlook, Access, SharePoint, Visio) / Bloomberg Terminal / Salesforce / Tableau / Clearwater Analytics / Moody's Analytics PFaroe / DealCloud / PARis Portfolio Analytics and Reporting Platform / Aladdin Portfolio Management / Preqin / Pitchbook / Snowflake / Claude / Appian

Other Skills: Alternative Investments / Private Markets / Investor Solutions / Platform Strategy / Product Strategy / Investor Relations / Institutional Investors / Wealth Management / Client Engagement / Investor Communications / Platform Development / Business Strategy / Strategic Partnerships / Investor Experience / Process Optimization / Private Equity / Private Credit / Real Estate / Infrastructure / Secondaries / Investment Operations / Due Diligence / Cross-Functional Leadership / Data Analysis / Change Management

Volunteerism: Iona University - Finance Department Board Member