

Client Name

Contact information

Summary of Qualifications

Throughout my career in corporate finance, I have guided start-ups as well as Fortune 500 companies, leveraging my expertise in capital funding, mergers & acquisitions, and strategic portfolio management to deliver impactful outcomes. I have served as the finance partner to the c-suite and Boards of Directors in technology, data analytics, healthcare and energy industries, where I empower my team by instilling a positive culture and a fundamentals-based approach that enhances performance for optimal results. Off-hours, I'm best known as the equipment manager and part-time chauffeur for two young athletes.

Selected Accomplishments

- Raised \$25M in venture debt & \$100M in equity capital to establish unicorn status for a VC-backed startup
- Negotiated JV agreement with one of China's flagship SOEs
- Achieved stakeholder consensus to focus on developing Company's first SaaS product
- Divested Peabody's non-core U.S. operations at attractive valuations
- Realized 18% return on \$50M portfolio of structured finance investments in Indonesia
- Generated \$45M+ of EBITDA by negotiating an infrastructure contract buyout
- Developed & executed strategy to expand market penetration & establish an operating presence in Asia
- Implemented portfolio management framework for evaluating operations & identifying investment & divestiture targets
- Transformed corporate culture to one of inclusivity & autonomy where collaboration & productivity flourish
- Established organizational processes for product pricing & sales pipeline management
- Created budget & reporting framework for new business unit generating >\$2B in revenues & \$200M in EBITDA

Professional Experience

Company Name

2017 – current

Executive Vice President, Chief Financial Officer & Corporate Secretary

- Member of executive leadership responsible for all financial aspects of the business, as well as, technology operations, procurement, legal, human resources (including compensation, benefits & org planning), product pricing & board reporting
- Manage capital funding & debt financing
- Drive continuous process improvement for finance & accounting processes & operational efficiencies, including implementing an ERP system
- Significantly reduced non-core spending
- Manage evolve24's strategic planning process
- Lead cross-functional efforts for new product development and go to market strategies

Company Name

2016 - 2017

Vice President - Finance & Corporate Development

- Led Financial Planning & Analysis function & Corporate Development function
- Managed capital structure in partnership with the CFO
- Secured debt & equity financing (Lumeris, continued)
- Developed Company's annual operating plan & maintained 5-year strategic plan

- Reorganized departmental cost centers to better align with business operations
- Worked with senior leadership to develop & implement value-enhancing growth strategies
- Founding member of Capital Allocation committee

Company Name

2008 - 2016

Vice President - Corporate Development

(promoted 4 times to positions of increased scope & responsibility)

- Led corporate development activities in the Americas
- Served as head of Finance and Administration for Peabody's Asia & Trading Business Unit with global activities on 6 continents; annual revenues greater than \$2B
- Directed Structured Transactions group & managed investments in Indonesian producers to support global trade initiatives and capitalize on growing Pacific Rim demand
- Identified portfolio optimization & growth opportunities to generate near-term liquidity & improve leverage metrics
- Directed >100-person team to execute \$350M divestiture process for multiple operations
- Managed transition process to carve out divested operations; obtained transaction approval from Federal Trade Commission
- Developed Peabody's market entrance strategy to capitalize on demand for coal in Asia
- Managed \$250M power plant investment & Peabody's power trading activities
- Chaired Enterprise Risk Management Committee for Asia and Trading business unit
- Individual performance documented in top 5%, based on leadership competencies and contributions; designated as a "high potential" employee

Company Name

2005 - 2008

Consultant - Financial Advisory Services

- Performed business valuations, damage/risk calculations & provided financial expert reports & testimony for litigation cases
- Advised on attorneys on strategy development for M&A practice

Certifications

Certified Public Accountant

Active TS/SCI security clearance

Education

Colleg Name

MBA – Accounting & Finance

B.S. – Business Administration (Accounting)