

## SENIOR FINANCE & OPERATIONS EXECUTIVE

### PROCESS RESTRUCTURING • FINANCIAL PLANNING & CONTROL • INVESTMENT PLANNING & EXECUTION

Senior Executive offering accomplished career focused on driving investment valuation, process design, and internal control for enterprise organizations. Demonstrated success in leading financial modeling and analysis for private equity, real estate, and hedge fund investments. Accomplished change agent successful in transforming operations through the design and enhancement of business processes and technologies to establish growth opportunities. Strategic advisor across all business functions with advanced ability to build and manage partnerships with stakeholders, board members, and fellow executive leaders to support strategic planning and drive continuous improvement.

#### Areas of Expertise:

Financial Analysis • Financial Modeling & Reporting • Business/Investment Valuation • Financial Forecasting  
Stakeholder/Investor Relations • Process Design & Optimization • Portfolio Strategy, Performance & Management  
Short & Long-Term Strategy Design • Board & Executive Presentations • Corporate & Capital Market Analysis  
Internal Control & Compliance • Risk Analysis, Management & Mitigation • Market & Business Strategies

## PROFESSIONAL EXPERIENCE

### FINANCIAL MANAGEMENT COMPANY, New York, NY

2011 – Present

#### Principal, Head of Valuations

Senior executive for the Valuation team charged with providing strategic leadership of valuation and analysis of existing investment portfolio. Partner with investment resources to create valuation models and facilitate approval of 400+ privately valued holdings across Private Equity, Credit, and Real Estate platforms. Leverage expertise in industry regulations, documentation standards, and best practices to determine fair value of investments in accordance with ASC 820 guidance of private company, structured loans, and real estate holdings. Build and maintain strong relationships with stakeholders and executive leadership to support valuation process.

- Lead Valuation Committee meetings, presenting valuation materials to executive leadership team comprised of CFO, CAO, Head of Legal, Head of Risk, and Senior Investment Partners to gain approval.
- Scaled the Valuation function, absorbing 400% investment growth throughout tenure as firm grew to \$250B in assets; recruited new talent to support the 20% CAGR, increasing staff from 3 to 8 direct reports.
- Spearheaded the research, selection, and rollout of a firm-wide portfolio data collection technology platform.
- Orchestrated the ground-up development of a best-in-class valuation process for leading SEC registrant multinational Private Equity Firm. Established best practices and framework for all valuation activities, including portfolio company evaluations, purchase price allocations, and platform acquisition diligence.
- Collaborated with vendors to design cost-effective outsourcing solutions, capturing greater profit results while maintaining optimal risk mitigation and internal control.
- Directed the negotiation of favorable provider terms across 10+ service providers; prevented \$1M in additional annual expenses by securing zero cost increases for services rendered for over 7 years.
- Designed and implemented Sarbanes Oxley (SOX) internal control framework across the valuation organization to ensure regulatory compliance and risk management.
- Key contributor for the design and implementation of Assets Under Management (AUM) reporting data collection and reporting tool used in quarterly public filings. Created data models and reporting to support 50+ inputs for 200+ reporting entities per quarter. Led the post-rollout transition to a stabilized data warehouse platform and online submission tool.

**ABC FINANCIAL, New York, NY**

2008 – 2011

**Merchant Banking Associate – Principal Investment Area**

Provided accounting, valuation, and investor relations services to support the growth and management of a \$10.5B GS Loan Partners Fund within PIA. Performed valuation and created financial models, calculated investment performance metrics, and prepared presentation materials for executive leadership team, board members, and other key stakeholders.

- Prepared Quarterly Investor Report, including market overview, performance summary, and investment update.

**FINANCE & ASSOCIATION, New York, NY**

2007 – 2008

**Research Associate – Mid & Small-Cap Banks**

Charged with leading extensive research on mid- and small-cap bank portfolio to prepare reports and provide strategic recommendations for public stocks. Analyzed portfolio and market metrics, constructed financial models, calculated future earnings, and researched industry trends.

- Prepared research reports on 25+ stocks, outlining company and industry analysis, performance projections, and investment recommendations.
- Developed financial models, including earnings forecasts, DCF, loss estimates, and capital stress tests.
- Leveraged financial data suite, including SNL DataSource, FactSet, Bloomberg, and Thomson/Reuters to conduct accurate financial analysis and modeling.
- Selected as a key contributor for cross-departmental initiative to identify direct financial value of small-cap research efforts and its impact on sales and trading metrics.
- Key contributor for seminal cross-industry macro report analyzing the impact of real estate value declines on bank loan holdings in the early spring of 2008.

**ABC CORPORATION, New York, NY**

2002 – 2007

**Senior Associate – Financial Services Assurance**

Led cross-functional teams through the coordination and execution of audits, serving the needs of Asset Managers, Brokers/Dealers in Securities, and Hedge/Mutual Funds. Assessed findings and implemented strategies and processes to drive efficiency improvements and support increase in engagement profitability. Built partnership with senior executive to gain insight into corporate strategy, internal control, and business/financial projections.

- Spearheaded the creation of an engagement pricing model to enable optimal priced services provided for one of the largest mutual fund clients, which improved engagement realization by 20%.

**EDUCATION | PROFESSIONAL DEVELOPMENT****STATE UNIVERSITY**

Bachelor of Science, Accounting (Minor: Management Information System)

**Professional Development**

FINRA Series 7, 86, 87

Chartered Financial Analyst

Certified Public Accountant

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