

CORE COMPETENCIES

- ◆ Financial & Strategic Planning
- ◆ Budgeting
- ◆ Presentations to All Levels of Organization
- ◆ Cross-Organizational Leadership
- ◆ Financial Analysis
- ◆ Forecasting
- ◆ Change Management
- ◆ Team Leadership
- ◆ Long Range Planning
- ◆ Mergers & Acquisitions
- ◆ Diverse Software Knowledge
- ◆ Detail Oriented

QUALIFICATIONS/ATTRIBUTES

- ◆ Strategic thinker with excellent managerial, leadership, and communication skills.
- ◆ Skilled at managing a cross-functional team over various locales.
- ◆ A team player, also capable of working alone to resolve issues and problems.
- ◆ Able to effectively determine and address needs of colleagues and clients by careful listening and accurately interpreting oral and written material.
- ◆ Ability to productively work with and relate to all levels of an organization.
- ◆ Have worked effectively with start-ups as well as multinational corporations.
- ◆ Have managed asset values ranging from \$10K to \$15B.

CAREER EXPERIENCE

2019 - Present

CaryLand, LLC/ Ashven Land, LLC, Consulting Services Firm

Chief Financial Officer

- Negotiated with Canadian producer of testing machine for North American distribution rights of agricultural testing machine for cannabis, hemp, metals, pesticides and other agricultural composites.
- Created proformas for potential business lines, forecasting revenue, expenses and creating budgets for all areas of the business.
- Planning with other senior management and outside advisors on every aspect of business including but not limited to corporate strategy, product positioning/management, legal strategies, marketing approaches, operations oversight and employee hiring.
- Point person for all financial planning, investment negotiations and client/customer/partner negotiations.

2018 - 2019

Audientis, LLC, Family Business Advisory Firm

Director

- Worked with clients on strategic initiatives such as reorganizations, recapitalizations and development of new business lines. Involved with Corporate Development and training for strategic initiatives undertaken.
- Led due diligence efforts for new projects and new ventures.
- Worked with Business Operations of clients including finance and accounting to create proformas, budgets and help them evaluate actual performance to budget and projections. Helped problem solve for variations.

2014 - 2018

Settlement Solution Services, LLC, Professional Services Advisory Firm

Principal

- Spearheaded creation of an Assessment Review Diagnostic, to be used as a self-assessment by clients in determining their preparedness for accreditation under the new Consumer Financial Protection Bureau's ("CFPB") regulatory requirements.
- Successfully coached clients for compliance of their operations as mandated by the CFPB regulations.
- Worked with clients on corporate culture, strategic initiatives and corporate development.

2008 - 2014

GlassRatner Advisory and Capital Group, LLC, Financial Advisory Firm

Director

- Led efforts in the following areas:
 - Due diligence investigations and forensic accounting for a multi-billion dollar development company.
 - Stepped in as CFO/ Controller of several companies at all levels of success having to evaluate and make decisions regarding staffing, procedures, future planning, and run the day to day operations of the department.
 - Reported on cash flow analysis as an expert, money tracing and corporate malfeasance, and transactions from the Company's general ledger system to more accurately quantify the value of the formerly \$15B conglomerate. Forensic accounting investigation for a multi-national insurance, chemical and real estate conglomerate.
 - Acted as Special Assets Officer for an FDIC loan loss bank. Successfully liquidated the multi-million dollar real estate portfolio of a failed lending corporation, selling off the most challenging properties after the company had stripped off the best properties to attempt to stave off impending bankruptcy.
 - Restructured a \$2.1B real estate portfolio in excess of 300 entities.
- Performed multiple due diligence investigations and pre and post purchase valuations of bank assets for purchase under FDIC loss share agreement.
- Managed multiple litigation support and expert witness cases providing analytics for various fraud, mismanagement and general forensic accounting for a varied group of industries with a focus on financial institutions, private equity and venture capital funds, service companies, real estate development and real estate management companies.

2008

CBRE | Melody, Commercial Mortgage Banking Services Firm

Analyst

- Identified optimum capital structure to match lender and borrower objectives.
- Managed all aspects of property valuation/underwriting, market research and financial proposal preparation for debt and equity transactions.
- Provided effective communication to participating parties of financial transactions to ensure all necessary paperwork, due diligence procedures and necessary processes were completed appropriately and timely.
- Served as a liaison between prospective borrowers and the capital markets.

2003 - 2008

Touchstone Properties & Investments, Real Estate Mortgage Private Equity Lending Institution

President/Owner/Founder

- Directed marketing, operations, and investor/borrower relationships.
- Increased value of Company investment portfolio approximately 10% via acquisition of loans. Led all due diligence processes necessary to approve financing to prospective clients.
- Raised over \$2.5M in private equity.
- Continued day-to-day obligations as needed.

1998 - 2003

Lib Properties, LTD, Mortgage and Investment Banking Firm

Vice President

- Attracted new brokers and clients to the firm, creating a 38% increase in total value of loans closed.
- Prepared necessary due diligence to support lending transactions, inclusive of loan origination documents, property evaluation in conjunction with other due diligence, and all financial analysis of prospective financing opportunities.
- Determined profitability between private and institutional funding by analyzing several components of the transaction, inclusive of reviewing files for credit worthiness, the ability for the perspective borrowers' ability to repay financial obligation, confirmation of property valuation via the due diligence process, and approving the financial transaction.
- Specialized in financial management and reporting, inclusive of final review and analysis of financial statements and forecasting financial data.
- Managed back office staff with respect to loan processing, accounting and loan servicing.

1996 - 1998

Universal Sports America/ Host Communications, Inc., Sports Media and Marketing Firm

Senior Financial Analyst

- Finalized all monthly and yearly financial closing processes, created financial statements and analyzed performance and profitability of fifteen individual entities with over \$60M in revenue.
- Interfaced with sales, marketing, and operations to develop new and innovative strategic projects and alliances.
- Worked across departmental lines to brainstorm and develop tactics for sustaining projects for strategies other than strictly financial.

1993 - 1996

Peterson Consulting Limited Partnership, Atlanta, GA, Litigation Consulting Firm

Senior Consultant

- Assisted counsel with the valuation of various financial institutions to aid in litigation.
- Analyzed consumer loan portfolios for fraud and violations of standard lending practices and underwriting guidelines; communicated these findings to regulatory authorities and outside counsel.
- Served as Controller of a \$20M Resolution Trust Corporation ("RTC") Conservatorship; coordinated daily operations and investment decisions; managed an accounting staff of seven people; prepared the bid package and supervised acquirer due diligence.
- Played a key role in over \$300M in sales of several federally chartered savings and loan associations. Performed re-pricing of residential loan portfolios in conjunction with the sale of several savings and loan associations to multiple acquirers.

EDUCATION/ CERTIFICATION

- ◆ **University of Georgia, Terry Graduate School of Business**, Athens, GA, MBA 1992
Concentrations in Corporate Finance and International Business
- ◆ **Tulane University, Freeman School of Business**, New Orleans, LA, BS-Management 1989
Accounting concentration with Management minor
Related course work in decision models, business law and marketing
- ◆ **Nationwide Mortgage License (NMLS# 1524381) Licensed in Georgia, Florida and Illinois**