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## ***Executive Profile***

Accomplished senior executive providing background in operations management, strategic planning and business leadership. Proven experience in business development, marketing, branding, and revenue generating strategies. Experienced in start-up companies and the ability to turn-around departments and companies.

A solid reputation for fostering strategic business relationships and alliances with clients and industry experts, and identifying and capitalizing on profitable revenue opportunities.

Expertise and Skills:

- ✦ Strategic and Business Planning
- ✦ Corporate Management
- ✦ Sales / Marketing Leadership and Development
- ✦ Relationship Cultivation
- ✦ Staff Recruitment, Training, and Development
- ✦ Organizational Audits of Multi-Departments
- ✦ Customer Services Management
- ✦ Budget and Expense Control
- ✦ Event Management
- ✦ Revenue Growth
- ✦ Team Building
- ✦ Public Speaking
- ✦ Website design

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## ***Professional Experience and Background***

### **Principal / CEO**

January 2008 - Present

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is an advisory firm for the secondary loan sales market. The company provides loan transfer services for buyers and sellers of commercial and specialty assets. Customers include banks, credit unions, life insurance companies, pension funds, and other financial institutions on asset management, through loan purchases and sales. I have used my sales, corporate and business development background to accomplish the following:

- ✦ Researched and cultivated joint ventures and partnerships
- ✦ Established alliances and business development opportunities
- ✦ Structured and closed sales opportunities
- ✦ Defined target markets and launched national marketing campaigns
- ✦ Secured >\$518MM in loan sale assignments

**Vice President**  
**Director of Sales, Marketing and Product Development**

May 1998 - December 2007

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Pioneered organization from start-up. Planned, coordinated, and implemented company's business development strategies; amplified program awareness. Managed company's marketing and product branding and development; coordinated business events and presented programs at business forums and conferences. I utilized my corporate business background to accomplish the following:

- ✦ Supported CEO
- ✦ Established and built relationships with a wide range of clients
- ✦ Researched and identified business partners
- ✦ Led my team to exceeded sales projections
- ✦ Achieved top producer resulting in >\$100MM in transactions during first year of business exceeding strategic goal
- ✦ Multiple recipient of company's highest production awards
- ✦ Developed customer service and marketing plans and strategies; sourced, cultivated, and managed relationships with clients; developed knowledge of customer base and competition
- ✦ Broadened product line and developed new products that increased earnings
- ✦ Developed media plans
- ✦ Expanded territorial production
- ✦ Developed and managed company's loan sale platform
- ✦ Sold > \$310MM in commercial real estate loans working with financial institutions such as Santa Barbara Bank & Trust, Key Bank, Bayview Financial, GE Capital and Washington Mutual

**Director**  
**Shareholder Services / Asst. Transfer Agent / Asst. Corporate Secretary**

September 1970 - May 1998

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Held management positions throughout career including period as Board appointed Officer of the Company. The following is a sampling of additional accomplishments:

- ✦ Served as Director Shareholder Services; managed department of 54 employees responsible for administration of company stocks, bonds and securities.
- ✦ Supervised offices throughout the company's service territory; oversaw gas, electric, and customer service operations.
- ✦ Co-authored cost-of-capital testimony for presentation to Federal Energy Regulatory Commission and California Public Utilities Commission.
- ✦ Represented company with media and political representatives.
- ✦ Served as Instructor for company's customer and shareholder service training programs.
- ✦ Coordinated company's Annual Meeting of Shareholders; appointed and served as Inspector of Election.
- ✦ Managed call center operation; designed and administered client service survey – raised customer satisfaction ratings from 63% to 97%.

**Honors and Accomplishments**

- ✦ Officer of Pacific Gas and Electric Company
- ✦ Finance Commissioner; City of Belmont
- ✦ Chairman; Western Securities Transfer Association
- ✦ Organizer; Bay Commercial Bancorp
- ✦ Director; Risk Management Association's Golden Gate Chapter
- ✦ Multi-recipient of Bridger Commercial Funding's Annual Top Producer Award
- ✦ Published author - industry periodicals, freelance recreational journals

### **Community Services**

- ✦ Belmont's Library Task Force
- ✦ San Francisco Food Bank
- ✦ Shriners Hospitals for Children
- ✦ California Wildlife Protection
- ✦ Youth Education and Mentoring Programs

### **Education**

- ✦ University of Phoenix: M.B.A.
- ✦ University of San Francisco: B.S., Business Administration and Finance