

EXPERIENCE

C-Anax Ventures & Advisory – Plantation, FL; April 2013 – Present

A management consulting company. The word "Anax" is Greek for king or lord & "C" in front of Anax simply stands for C-Suite.
President & CEO

Assisting various companies (including early to mid-stage) with business needs.

- Perform a top down analysis of a company (startups to mature companies) and offer strategic direction, year-over-year analysis and exit strategies.
- Streamline operational, financial and sales best practices for forecasted corporate growth.
- Position business product suites with customized go-to-market strategies including sales, branding and marketing.
- Develop customized business plans tailored for capital fundraising (including venture capital) and strategic partnerships.
- Build company financial models to show short-term and long-term predictive quantitative revenue growth.
- Ensure overall business, marketing and strategic direction is properly conveyed on a company's website.

BANK OF AMERICA MERRILL LYNCH – Miami, FL & Charlotte, NC; June 2005 – June 2015

Amongst the largest International banks with assets over \$2.1 trillion and offices in over 150 countries.

Senior Vice President, Strategy & Execution - International Wealth & Investment Mgmt. – July 2010 – June 2015.

Senior Vice President – Established a Fixed Income Trading Desk - Sydney, Australia – February 2010 – June 2010.

Senior Vice President Consultant - US Trust – October 2007 – January 2010.

Vice President – Business Banking - September 2005 – September 2007.

Senior Analyst – Consumer Banking & Other Divisions – June 2005 – August 2005.

Managed a \$100 million budget for department sales & day-to-day international operations of 1600 persons.

- Exercised responsibility for overall strategic direction, coordination, and execution of employee / client satisfaction, and business processes improvement for greater revenue growth and cost containment.
- Implemented common working practices and protocols across organization to synergize branding, communication and sales activities.
- Ensured compliance with applicable laws and regulations governing banking activities, including antitrust activities and risk management process to drive business execution within a domestic / international regulatory framework.
- Leveraged data science, industry and internal business information intelligence to help drive strategy & performance.
- Managed U.S. and international acquisitions (Merrill Lynch, US Trust & LaSalle) & divestitures (Julius Baer).
- Set up and fully execute domestic/international divisions (ex. Australia – fixed income trading desk, China - banking charter & India – US Trust support center).
- Participated in an executive leadership program.

CHERRY HILL TOWNSHIP - Cherry Hill, NJ; September 2003 - July 2004

An affluent municipality of 100,000 people with an operational budget of approximately \$280 million.

Director of Operations, Procurement and Insurance - Reported to the Mayor and Business Administrator

Directed operations, risk and purchasing activities with over \$100 million in P&L responsibility.

- Increased operational efficiency by saving over \$500,000 in annualized costs as the implementation expert.
- Prepared month end reports that included departmental forecasts, expense reports, budget allotments, future usage models, procedural reports and risk analysis.
- Authored a New Jersey state purchasing card manual (payments) that contained procedural and financial guidelines for all Townships and Counties to follow.

ACTRADE FINANCIAL TECHNOLOGIES - New York, NY, May 1999 – June 2003

Trade finance, payments and processing company. Firm is closed and collection tool sold to Siemens Financial.

Vice President, Strategic Initiatives - Reported to the President and CEO

Managed a P&L of nearly \$5 million and a senior team concentrating on sales & product development.

- Developed and implemented a multi-million dollar global sales plan & cultivated new/existing business relationships.
- Managed a core team of sales professionals focusing on selling to corporations, banks and strategic partners.
- Created an alternative, and now widely adopted, short-term payment tool for business-to-business usage.
- Obtained multi-million dollar credit facilities & developed a web-based tool for short-term borrowing.
- Oversaw trade finance/supply chain product usage as a source for banking and corporate payments achieving over 100% growth per year.
- Spearheaded all marketing and public relations activities to develop corporate communications, increase company awareness and drive new business opportunities.

CARSON GROUP - New York, NY; February 1997 - April 1999

Investor relations/ investment banking consulting company. Firm sold to Thomson Financial.

Senior Analyst Consultant- Reported to a senior partner

Synthesized and assessed financial/industry data for investment banking and equity activities.

- Sold research services to large transportation companies.
- Provided analysis of daily trading activities including stock movement, discussions with buy/sell side analysts and senior executives at client sites.
- Specialized market focus in the transportation sector including companies such as Norfolk Southern, Continental/United Airlines, GATX, and Ryder.
- Published daily, weekly and monthly data market reports on sector trading and competitor analysis utilized by senior executives and board members.

EDUCATION

University of Miami School of Business - Coral Gables, FL, May 2006

Master of Business Administration, Specialization in Finance/Management, 3.5 GPA

George Washington University - Washington, DC, July 1994

Bachelors of Arts, Criminal Justice

Massachusetts Institute of Technology – Boca Raton, FL

Venture Mentor Training

Rutgers University - New Brunswick, NJ 2003

Public Finance and Public Purchasing classes

Rowan University - Glassboro, NJ, Summers 1991-1993

Pre-Medicine related course work

ACCREDITATION

Black Belt Six Sigma (obtained while at Bank of America) - Set of tools, techniques and strategies for process improvement. Identifies and removes the causes of defects (errors) and minimizing variability in business processes. Black belt is the second highest accreditation within this discipline.

Benchmarking (obtained while at Bank of America) - The process of comparing one's business processes and performance metrics to industry bests or best practices from other industries.

ACTIVITIES

The George Washington University

Advisory Council Member - Present

University of Miami

Mentor (Assist students) & Judge Business Plan Competitions – Business School - Present

Florida International University

Start-Up FIU - (Working with start-up companies helping to achieve growth) – Founding Mentor - Present

Florida Atlantic University

Tech Runway - (Working with start-up companies helping to achieve growth) – Founding Mentor - Present

South Florida Touchdown Club Foundation

Miami, FL - *Board Member* – Non Profit Organization, Present

Prudential Securities

Philadelphia, PA - *Research Assistant*, September 1995 - October 1996

University of Miami

Coral Gables, FL - *Redesigned Web Content*, 2005

Senate Judiciary Committee for Arlen Specter

Washington, DC - *Asst. Congressional Aide*, Fall 1993

White House

Washington, DC - *Agency Liaison Intern*, Spring 1994

National Jewish Coalition

Washington, DC - *Correspondent*, Spring 1993