

Brandon Gillen

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EDUCATION

Michigan State University
Eli Broad College of Business
Bachelor of Arts, Finance

East Lansing, Michigan
May 2019

WORK & LEADERSHIP EXPERIENCE

Sabal Trust Company
Relationship Manager

St. Petersburg, Florida
October 2021-Present

- Provide support to portfolio managers to maintain asset allocation and investment strategy for each client/family
- Build and maintain client relationships through timely and thorough communication
- Assist in multiple financial planning projects for high net worth individuals
- Leader of the business development and distribution tracking for the team
- Continuously improving various operational inefficiencies for the team
- Provide support to senior fiduciaries to execute trust obligations

LCG Advisors
Healthcare Associate

Tampa, Florida
August 2020-September 2021

- Assisted on multiple \$25mm-\$325mm transactions in which Operators of skilled nursing facilities, hospitals, laboratory testing centers, pharmacies, and surgery centers were seeking a revolving line of credit or secured term loan
- Conducted deep-rooted analyses on each facility's accounts receivables trends, liabilities, cash, payroll taxes, real estate taxes, financial statements, and patient statistics
- Data mined and extracted large amounts of financial reports using Microsoft Excel in order to present accurate findings to the Lender
- Managed a \$43mm line of credit due diligence deal where the potential Borrower was the Operator of 30 skilled nursing facilities

Alvarez & Marsal
Financial Crimes Consulting Analyst

Tampa, Florida
May 2019-August 2020

- Performed a transaction review for a global bank by evaluating employee transactions that related to internal fraud and improper use of funds over a five-year period.
- Executed a fraud investigation by using internal databases to analyze emails, purchase orders, and receipts in order to understand employee-vendor relationships; this resulted in a discovery of Bid Rigging
- Completed a fraud investigation for a Fortune 500 company that uncovered acts of inflated financial statements, improper payments to auditors, and disguised loans to related parties

StepStone Group
Portfolio Analytics & Reporting Intern

La Jolla, California
May 2018-August 2018

- Analyzed and summarized discrepancies within the schedule of investments in each quarterly report for every assigned portfolio company
- Responsible for giving feedback on Private Placement Memorandums to the StepStone Investment Research team
- Tracked capital call and distribution notices from fund general partners while updating client accounts accordingly
- Completed reports summarizing changes in quarterly portfolio performance for 175 investment funds, including private equity, private debt, venture capital, real estate, real assets and infrastructure

Generational Transfer Entrepreneurs
Private Equity Associate Intern; Start-up Search Fund

Pittsburgh, Pennsylvania
May 2017-August 2017

- Responsible for researching lower middle market companies for potential acquisition; leading to one Letter of Intent and GTE's first acquisition
- Analyzed Confidential Information Memorandums, financial statements, and created industry outlook reports
- Connected with weekly speakers including search fund entrepreneurs and private equity partners
- Co-leader of email and letter campaigns to business owners and brokers