

QUALIFICATIONS SUMMARY

Financial Executive with proven success leading organizations to sustained profitability. Excellent problem solving, financial modeling, project design and management, customer relationships, negotiations and multi-functional team leadership skills. An enthusiastic and innovative team leader that consistently meets commitments with integrity. Extensive experience across diverse industries in:

- Private Equity Investments
- Strategic Planning
- Venture Capital Investments
- Mergers & Acquisitions
- Portfolio Management
- Wealth Management

CITIGROUP GLOBAL MARKETS, INC. New York, NY
INVESTMENT CONSULTANT

2009 -2011

Conduct investment reviews with clients to validate the clients investment objectives and prepare recommendations of appropriate investment products, strategic asset allocation, investment management structures, manager selection, performance measurement and evaluation, investment manager monitoring, transition advice, statements of investment policy and global research services.

MORGAN STANLEY, New York, NY

2007 – 2008

Financial Advisor – Global Wealth Management Group

- Advised high net worth individuals, family offices, and institutions.
- Consult clients with strategic and tactical wealth preservation, enhancement and wealth transfer.

GBC LLC, New York, NY

2002 – 2007

Managing Director/ private equity consultant

- Mergers and Acquisitions advisory for middle-market size companies. Consulted and cultivated partnerships with LBO and private equity funds to execute M&A and capital restructuring for the target companies. Investment banking and corporate finance for Divestitures, Management Buyout, and business valuations. Acquisition and Intermediary services, corporate Strategic advisory and management consulting for Technology, engineering and manufacturing companies in commercial and military applications.
- Experienced in buy-side and sell-side transactions for strategic and private equity funds. Developed successful plans for corporate growth by identifying targets and sourcing the proper channel, analyzing the investment opportunity.
- Utilized financial modeling including Discounted Cashflow, CAPM, WACC, Monte Carlo simulation, Terminal values, Multifactor model, and Credit model to identify the optimum ROI.

TYCO Electronics**Corporate Development Director****1992 – 2001****MULTITRONIKS, *President (Merged with Tyco Electronics in March 2001)***

- Spearheaded plans for growth that was implemented through strategic alliances, joint ventures, acquisitions, and divestitures. Identified and completed the acquisition of Intellipace in England to strengthen Multitroniks' presence in Europe. Created strategic joint venture with other European and Japanese manufacturers.
- Overall P&L responsibility for a manufacturer of advanced robotics and automation systems and precision equipment. Business development, sales and marketing, R&D and manufacturing of High-Speed Pick and Place systems utilizing Linear motors.
- Integrated the technology of business units, and initiated technical focus group, which accelerated the launch of three new Flexible IQ assemblers and merged the development activities and engineering management of UK operation with its US parent. Directed all facets of operation, sales and business development, marketing and R&D in the U.S. and the United Kingdom for maximum profitability.

RAGEN CORPORATION, North Arlington, NJ**1990 – 1992*****Vice President- Corporate Development***

Responsible for business development and long-term contracts to manufacture precision electro-mechanical parts according to commercial and military specifications. Markets served were military, aerospace, i.e. Lockheed Martin, Raytheon, Grumman Aerospace, General Dynamics, United Defense Corporation, IBM federal, Singer Kearfot, GE aerospace and aircraft, United Technology Sikorsky, Hamilton Standards, and equipment for electronics production assembly. Spearheaded turnaround from a \$1.5 million loss position to profitability. Conceived and implemented a new business plan which included the consolidation of a new division. Initiated cost reduction programs.

IMS, INC., Warren, NJ**1988– 1990*****Precision metal parts and electro-mechanical assembly.******Vice President of Sales***

Played a key role in the merger with Ragen Corporation in 1990; managed transition and consolidation. Planned and implemented penetration into the aerospace market by dealing with Martin Marietta, Boeing, GE Aerospace, Textron and United Technology. Increased revenues by 200% and expanded geographical sales coverage by establishing a successful network of direct and indirect sales force.

EDUCATION**M.B.A., Baruch College, City University of New York, 1991****B.S., Mechanical Engineering, NJIT****LICENSES**

FINRA Securities license series 7, 66; Futures 31; L&H

CURRENT MEMBERSHIPS AND AFFILIATIONS

New York University, M&A corporate finance department

Advisory board member; Mechanical engineering department, NJIT