Structured and executed a wide range of complex transactions, including corporate sales, acquisitions, mergers, joint ventures, corporate restructurings, recapitalizations, and leveraged buy-outs across a broad range of industry sectors.

**SELECTED CAREER ACCOMPLISHMENTS**

# The Benchmark Group, Inc. November ’02 - Present

**MANAGING DIRECTOR– Investment Banking**

# *The Benchmark Group is a financial services firm that provides that provides business succession planning, estate planning, and investment banking services to privately-held and closely-held firms. Boutique investment banking group, provides both M&A Advisory and Corporate Finance solutions to privately held businesses. Services include mergers and acquisitions, private placements, recapitalizations, management buyouts and strategic advisory.*

1. Spearheaded "Deal Making" successes and handled all aspects of transactions.
2. Originated new business, performed due diligence, and structured transactions.
3. Conducted, research, feasibility analysis, and documentation.
4. Developed offering memorandum.
5. Facilitated and established buy out strategies/plans.
6. Negotiated and closed transactions.

# Boenning & Scattergood, Inc. February – November ‘02

**VICE PRESIDENT – Investment Banking**

*Boenning & Scattergood is a full-service, regionally focused investment bank.*

# First Union Securities 1992-2002

**The Mid-Atlantic Companies, Ltd.** (acquired by First Union December 1998)

**VICE PRESIDENT - Private Business Group**

*Private Business Group specializes in M&A for privately held and closely held businesses.*

1. Provided corporate finance services to middle-market companies.
2. Managed team of associates and analysts who provide on-going support for all aspects of the transactions.
3. Marketed corporate services to strategic partners on nationwide basis and built strong external/internal working partnerships with diverse financial service groups and individuals.
4. Conducted comprehensive financial/strategic analyses that facilitated M&A activities and capital formation and effectively represented privately held, middle market businesses.

# CIGNA Worldwide 1986-1992

**MULTINATIONAL UNDERWRITER** 1989-92

**ASSOCIATE UNDERWRITER** 1986-88

1. Underwrote/serviced multinational property and casualty cash flow insurance programs for non-U.S. based multinational companies and underwrote/serviced international property captive programs for Fortune 100 companies.
2. Performed risk analysis, financial evaluation, and risk pricing. Responsible for cash flow management/evaluation of captive and cash flow insurance programs.

**EDUCATION & PROFESSIONAL**

Drexel University MBA, Accounting Concentration 1992

Philadelphia, Pa

Bucknell University BA, Economics & Japanese Studies 1986

Lewisburg, PA

Sophia University 1984

Tokyo Japan

* Member, Association for Corporate Growth
* Rotary Exchange Student (one year) to Japan
* Proficient in Japanese language
* Enjoys cycling, skiing, golf