KARIN (MCKITTRICK) KOVACIC  
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**NEW BUSINESS / CORPORATE & BUSINESS DEVELOPMENT/RELATIONSHIP MANAGEMENT**

Experienced relationship management professional with 10+ years in business origination and relationship building/ management and investor/ client relations with emphasis in the financial services sector; demonstrated continuous career progression managing P&L, penetrating new markets and leveraging passion for diverse industry knowledge management, generating new business, servicing investors and developing financial professionals; unique ability to build trusted advisor relationships and act as firm advocate with potential clients across all levels of client and executive leadership.

**KEY SKILLS & CORE COMPETENCIES:**

*New Business Development• Account & Relationship Building/Management • Client/Investor Relations  
Team Building • Innovative Marketing Initiatives • Penetrating New Markets• Professional Development*

**EXPERTISE IN:**

*Financial Services • Employee Services• Marketing• Private Equity/LBO transactions • Lending•*

*High Net Worth Client Management • Trading• Training/Professional Development*

**CAREER ACHIEVEMENTS**

**CBIZ MHM LLC, New York, NY 2010 – present**

*CBIZ (NYSE: CBZ) is a professional services company, providing a comprehensive range of business services, products and solutions that help clients grow and succeed by better managing their finances and employees. CBIZ is associated with Mayer Hoffman McCann P.C. (MHM), a national, independent CPA firm. Together, CBIZ and MHM rank as one of the Top Ten accounting providers in the US.*

**Business Development**

* Sourced 125% of annual goal in 2011.
* Increased brand awareness by organizing company’s presence at conferences and overseeing all sponsorship efforts.
* Direct partners and staff in the participation of business development strategies; develop accountability metrics and internal communications regarding marketing efforts.
* Maintain and develop organizational culture, values and the CBIZ reputation in its market and with all associates, clients, practice people and referral sources in the New York office
* Research, evaluate and manage vendors who can help deliver the firm’s message to targeted market segments. Successful in branding, developing lead generation programs, competitive analysis, evaluating existing/prospective ad campaigns and event planning specific to our targeted audience.
* Partner with Marketing Department to analyze and characterize identified markets, collect data, manage sales campaigns, and create tools to better penetrate territories and clients
* Responsible for expanding client base and account penetration
* Create business development training materials and teach professional development for all staff
* Develop and jointly pursue new business opportunities through participation in appropriate conferences and external meetings

**ASSOCIATION FOR CORPORATE GROWTH, Connecticut Chapter 2011- Present**

*The Association for Corporate Growth (ACG) is the global community for* [*mergers and acquisitions*](http://en.wikipedia.org/wiki/Mergers_and_acquisitions) *and corporate growth professionals, helping connect capital with opportunity. ACG provides its members with the research, tools and networking opportunities to grow their businesses and themselves professionally.*

**President (VOLUNTEER)**

* Responsible for providing leadership, exercising general supervision over chapter activities and conduct chapter affairs in accordance with the chapter bylaws and/or operating policies.
* Attend all meetings of the chapter board, chapter members and any events sponsored by the chapter
* Conduct monthly board meetings with Committee Chairs; oversee and evaluate the activities of committees
* Review all external chapter communication and act as a liaison with ACG Global and other Chapters

**KARIN M. KOVACIC page 2**[**karinmck@yahoo.com**](mailto:kareinmck@yahoo.com)

**FIFTH STREET CAPITAL, White Plains, NY 2005 – 2009**

*Specialty finance company that lends to and invests in small and mid-sized companies in connection with investments by private equity sponsors*

**Vice President** 2005 - 2009

* Headed up the New England deal origination and sourcing team; managed private equity transactions from inception to completion; sourced more than $2B in potential deals and successfully recommended and closed private equity transactions with total funding in excess of $50MM
* Conducted all (non-financial) aspects of due-diligence for deals; responsible for sponsor information, deal analysis, proprietary scoring; presented results and recommendations to the Investment Committee’s executive management
* Strong collaborator across divisions to ensure all aspects of deal/transaction closing proceeded seamlessly; maintain strong working relationship with past and present deal teams including senior & executive management
* Leadership responsibility for 2 direct reports (analyst and business development professional)

**UBS, Greenwich, CT 2001 – 2005**

*A premier global financial services firm offering wealth management, investment banking, asset management and business banking services; revenues of $31B*

**Registered Client Services Associate**

* Managed portfolio of institutional accounts; led all trading activities including both equities and fixed income buy/sell transactions
* In charge of managing cash management flows in and out of client accounts; provided leadership oversight for receives/delivers notifications, account maintenance and research & technology
* Initiated new business relationships; conducted in-depth market research to identify new prospective clients; led investment presentations and meetings; feedback included exceptional communication and presentation skills

**SALOMON SMITH BARNEY, Greenwich, CT 1997 – 2001**

*Premier brokerage firm providing research, portfolio management and full-service trading capabilities; wholly-owned subsidiary of Citigroup*

**Registered Associate**

* Member of a four-person team managing >300 high net worth clients representing >$500M AUM
* Successfully managed diverse responsibilities including trading, sales, research, marketing; conducted market research and successfully prospected territory in highly competitive markets
* Syndicate coordinator for the Greenwich office; managed one sales assistant

**EDUCATION**

**STATE UNIVERSITY OF NEW YORK, Purchase, NY**

B.A., Liberal Arts studies; Magna cum Laude, Dean’s List (GPA: 3.9)

Received two scholarships reflecting academic performance

**BERKELEY COLLEGE, White Plains, NY**

A.A., Business Administration with emphasis in Marketing, Graduated with High Honors (GPA: 3.8)

**LEADERSHIP/OTHER**

**Board Positions**: President, Association for Corporate Growth, Inc. (Connecticut Chapter)

Junior League of Greenwich (Fund Development)

Association for Corporate Growth, Inc. (Intergrowth- Experience Committee 2008-2009)

**Memberships**: 85 Broads (Networking group of Women in Finance)

100 Women in Hedge Funds (Networking group of Women in Finance)

W.A.V.E (Women’s Association of Venture and Equity)

Junior League of Greenwich (Voluntarism)

American Heart Association, Go Red

**Certifications:** Series 7, 63 and 65 licensed (1997 – 2006)