

- Experienced ex-McKinsey financial analyst with expertise in equity valuation, fundamental investment analysis, sophisticated modeling and data analysis
- Successful long-short equity investor who applies a bottom-up value-based approach
- Experienced in statistical analysis, R and Python programming and data analysis
- Harvard-trained securities, corporate and M&A attorney

TIMBERLAKE CAPITAL MANAGEMENT LLC, Princeton, New Jersey

Consulting Principal

January 2011 – present

- Identified attractive investments in equities, leveraged loans and high-yield bonds using multiple valuation approaches and created financial models in Excel for equity analysis
- Completed detailed financial model and valuation for a \$20 bb multiline industrial firm to identify high-impact value creation opportunities
- Programmed solutions with statistical and data analysis techniques in R and Python. Created visualizations for data exploration and presentation
- Currently serve as non-executive director and consultant for Starvest plc, a London-based AIM-listed investment company supporting early-stage mineral exploration ventures

IRONBOUND CAPITAL MANAGEMENT LP, Princeton, New Jersey

Senior Investment Analyst

March 2004 – July 2005; October 2008 – December 2010

- Top-performing analyst at concentrated global long-short equity hedge fund with AUM up to \$700 mm
- Initiated profitable long and short trades within numerous sectors, including cable and media, energy infrastructure, for-profit education, consumer discretionary, paper and packaging
- Shorts beat benchmark by -60 pctg points; longs outperformed by -18 pctg points annually

HIGHLAND CAPITAL MANAGEMENT, Dallas, Texas

Senior Portfolio Analyst

September 2007 – October 2008

- Analyst on media & telecom team at \$40 bb alternative investment manager that specialized in fixed income & credit
- Recommended equity and non-par bond ideas in team and credit committee presentations
- Developed detailed financial models and deal analyses in connection with contemplated private equity and venture capital transactions in the wireless telecom and cable industries

MCKINSEY & COMPANY, New York, New York

Specialist, Corporate Performance Center

February 2006 – August 2007

- Recognized as expert in valuation and financial modeling to support client engagement teams and advise C-level executives
- Prepared detailed financial models to evaluate implied market expectations, assess value creation opportunities and benchmark operating performance

ZWEIG-DIMENNA ASSOCIATES LLC, New York, New York

Analyst

April 2002 – February 2004

- Analyst (one of six) at \$1.5 bb long-short hedge fund. Covered media, broadcasting, telecom & homebuilders
- Developed proprietary research tools and sources to make trading recommendations in homebuilding stocks
- Analyzed companies, valued securities using multiple analyses and discounted cash flow models and monitored existing sector holdings within the portfolios

MERRILL LYNCH INVESTMENT MANAGERS (MLIM), Princeton, New Jersey

Equity Analyst

April 1999 – March 2002

- Analyst covering media, telecom and energy sectors on 9-person team managing two mutual funds (\$5 bb total AUM), Growth Fund and Global Value Fund
- Performed detailed fundamental research including preparing and maintaining comprehensive company-specific income statement, balance sheet, cash flow and valuation models
- Compiled and monitored market data using Bloomberg, FactSet, and CapIQ

Practiced M&A, securities and corporate law at DAVIS POLK & WARDWELL and REBOUL MACMURRAY



NON-PROFIT TRUSTEESHIPS

- **Stuart Country Day School of the Sacred Heart**, Princeton, New Jersey
September 2017 – present
 - Current committee service: Finance, Risk Management (Chair, 2019-present), Audit (Chair, 2017-present), Investments, Buildings & Grounds
- **Westrick Music Academy**, Princeton Junction, New Jersey
September 2019 – present
 - Current committee service: Executive Board and Finance Committee



HARVARD LAW SCHOOL, Cambridge, Massachusetts

J.D., *cum laude*

PRINCETON UNIVERSITY, Princeton, New Jersey

A.B. in economics, *magna cum laude*

- Elected to Phi Beta Kappa