

## **OBJECTIVE**

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Teach Finance, Investments, Mergers & Acquisitions, Accounting or related subjects as a lecturer/adjunct professor.

## **EDUCATION**

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**Pepperdine University**  
MBA (1985)

**Malibu, CA**

**Georgetown University**  
BS (1978) Double Major: Finance & Accounting

**Washington, D.C.**

**Northwestern University, Kellogg School of Management**  
Executive M&A Week (1997)

**Evanston, IL**

## **RELATED EXPERIENCE**

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### **UCSD Extension Lectures**

- For the last several years, I have been invited to lecture to international students on the topics of markets & investments and mergers & acquisitions
- The frequency varies but in the past year, there were 4 lectures (generally an hour each), with good student interactions

### **Corporate Teaching/Speaking**

- While working at SAIC, I developed and presented education/training materials for mergers & acquisitions to internal groups ranging from a handful of people up to 50-60 people, with presentation formats of 1 hour up to 2 days.
- I have given similar training to outside corporations on occasion.
- I have been a frequent speaker and panel member at industry conferences.
- I was a member of the Conference Board's Corporate Development roundtable and spoke at Conference Board conferences and meetings.

### **Investments:**

- I manage "friends and family" money (> \$10MM) and have developed a crisp understanding of markets and securities, and clear views regarding what occurs at the intersection of efficient market hypothesis and behavioral finance
- Investment Manager for investment group of retired SAIC executives; included portfolio analysis and presentations on securities & market valuation and market dynamics

## **PROFESSIONAL/VOLUNTEER EXPERIENCE**

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Current:        Board Member and Treasurer, Workshops for Warriors (nonprofit)  
                    Chair of Solana Beach City Budget & Finance Commission  
                    Investment Management for Friends & Family  
                    Occasional consulting for valuation and mergers & acquisitions (through full transaction)  
                    Interviewer for area Georgetown University applicants  
                    Tutoring at Casa De Amistad

Previous: **SAIC (1981 - 2012)**

Senior Vice President, Strategic Transactions (21 years) Led the M&A department and was responsible for screening, valuing, structuring, and negotiating and executing acquisition, divestiture and joint venture transactions for an \$11 billion international corporation. Managed a multi-disciplinary team and presented to the Board of Directors, Board Committees and executive management regarding specific transactions and general status reports, including weekly M&A meetings with the CEO. Closed approximately 100 domestic & international acquisitions with annual revenues of over \$3 billion plus over 30 investments, divestitures, and joint ventures. Formalized an acquisition process, developed training curriculum, and provided acquisition training and presentations to line and corporate staff. Featured speaker and panel member at many M&A conferences and as a member of The Conference Board's Corporate Development Council.

Corporate Vice President and Controller, Aerospace and Defense Systems Sector (10 years) Responsible for the financial and administrative management of an \$100 million sector. In that role, had oversight of the controllers and administrative staff of the operating groups within the sector. Major responsibilities included: Income statement and job cost reporting and management; analysis, pricing, and negotiation roles in support of acquisition candidates; working on strategic organizational planning to support continued growth; major real estate leasing activities; training; and coordination and oversight of business plans and performance. Involved in key contract proposal pricing strategies and fixed price contract proposal reviews, including the development of a cash flow analysis tool. Initiated and chaired a sector controller steering committee that supported development of company policy. Served on an ad-hoc basis on various corporate committees.

#### **Dynalectron (1978 - 1981)**

Group Finance Manager Responsible for overseeing the financial operations of two divisions with domestic and international contracts. Provided on-site assistance in the start-up of new contracts in Jubail and Yanbu, Saudi Arabia, including procedure writing, systems development, and training. Revised method of overseas income reporting.

Accounting Manager - Middle East Technical Services, Ltd. On-site in Riyadh, Saudi Arabia; responsible for annual budget, monthly financial reports and operating highlights, handling foreign investments and banking activities, related cash flow analysis, and general administrative and accounting functions.

#### ***Professional References***

- Available upon request to include references from current activities and past SAIC roles

**Interests:** Teaching, Investment, Cycling, Photography, Scuba Diving, Travel, Hiking/Climbing/Camping, Golf, Social