
OBJECTIVE

I enjoy utilizing my skills in financial analysis, accounting, due diligence, and business strategy to assist organizations in achieving their goals and objectives. I focus on providing flexible procedures and solutions to complex problems.

PROFESSIONAL EXPERIENCE

Management and Consulting Projects, San Diego, Ca.

2012- Present

Chief Financial Officer/ Senior Consultant/ Interim Executive*Provide Finance and Management Consulting to Boards and Executives*

- Chief Financial Officer of Institute of the Americas
- Due diligence, risk analysis, deal origination and screening for Private Equity Funds, Family Offices, Institutions and Individuals.
- Have completed all of the financial analysis, loan covenant construction, and due diligence for multiple large (\$5 M+) deals representing over \$125M in transaction value.
- Conducted the annual risk reviews for a Tier 1 North American bank's \$130M+ private equity portfolio.
- Chief Financial Officer of KTR Claims Management
- Chief Financial Officer of US Air (HVACR)

First Nations Capital Partners I & II, LLC, Woodland Hills, Ca.

2009-Present

Senior Consultant*Manage day to day operations of private equity fund.*

- Deal origination, negotiations, and management for private equity funds I & II.
- Perform research, due diligence, financial analysis, and modeling for acquisitions and portfolio companies.
- Development of an extensive network that includes capital sources, deal flow, and key service providers.
- Prepare letters of intent, term sheets, deal status reports, deal memorandums, and investment committee reports.
- Proven negotiator and due-diligence manager.

National University, La Jolla, Ca.

2012- Present

Certified Core Adjunct Faculty Member*Professor in the Finance Department at the School of Business Management*

- Educated thousands of students in 30+ classes both online and in traditional classes.
- Consistently achieve high levels of student and administrator approval in assessments.
- Teach upper division and graduate level courses in Finance and Business Strategy.
- Core focus in Financial Analysis, Valuation, Real Estate Valuation, Capital Markets, Stocks and Bonds, and Management Strategy.

Grossmont-Cuyamaca Community College District, El Cajon, Ca.

2014- Present

Coordinator & Adjunct Faculty*Professor in the Business Department at the Grossmont Campus**Coordinator for the Management, Marketing, International Business, Retail & Hospitality Management, and Tourism Programs.*

- Department Coordinator for the MMIB program including curriculum scheduling and faculty assignment.
- Professor for the Business Entrepreneurship, Introduction to Business, Business Communications, and Management classes.
- Teach both online and in traditional classroom settings.
- I am responsible for creating and implementing the curriculum as well as providing the class room instruction.
- Internship coordinator for the business department.

University of San Diego, San Diego, Ca.

2017-2018

Lecturer

Professor in the School of Business, Department of Finance and Real Estate

- Consistently achieved high levels of student and administrator approval in assessments.
- Teach upper division courses in Finance.
- Core focus in Financial Analysis, Valuation, Real Estate Valuation, Capital Markets, Stocks and Bonds, and Management Strategy.

Thrivent Financial, Temecula, Ca.

2007-2011

Financial Advisor

Operated an independent office providing financial management and advice

- Managed all aspects of a small business including marketing, forecasting and compliance.
- Managed over \$23 Million in client assets which resulted in the preservation of client principal and balanced asset growth.
- Advised small businesses and families with financial analysis and detailed planning that resulted in goal accomplishment and increased financial stability.
- Series 7 and Series 66, California State Life and Health (Inactive)

BOARD and COMMITTEE

Institute of Management Accountants – Diversity and Inclusion Advisory Committee - 2019-Present

Institute of Management Accountants – Board of Directors – President Elect – San Diego Chapter – 2019

Grossmont College – Governance - Budget Committee Board – 2018-Present

Director/Treasurer – KTR Claims Management Corporation, Inc. – 2015-Present

Director/Treasurer – US Air Conditioning, Inc. – 2015-2017

Director/Treasurer – Inovo Applications, Inc. – 2013-2014

EDUCATION

W. P. Carey School of Business at Arizona State University, Tempe, Az.

Master of Business Administration, Graduated with Honors

Certificate in Supply Chain Management

National University, La Jolla, Ca.

Bachelor of Science, Financial Management

Magna Cum Laude

PROFESSIONAL CREDENTIALS

- Certified Management Accountant (CMA)
- Proficient with MS Excel, MS Office Suite, Argus, Naviplan, Morningstar, LexisNexis, Bloomberg, Mergent, Quickbooks, MS Dynamics, Workday, MS Greatplains, Sales Force.

CAREER TIMELINE

