

**DETAILED RESUME OF:**  
**JOSÉ E. MUÑOZ, JR.**

**M.B.A., C.P.A., D.B.A.**

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**EMPLOYMENT--INTRODUCTION:**

I have over 40 years of senior executive management experience in large public corporations and small private start-ups, for-profits and non-profits, and domestic and international businesses. I have served on, and have reported to, boards of directors. I have over 17 years of college teaching experience at the graduate and undergraduate levels. I have very strong financial skills as evidenced by an M.B.A. in Finance and my C.P.A. certificate, and now, my D.B.A. in Accounting. I am completely fluent in English and Spanish.

My employment has been separated into three distinct phases of my life. First, and prior to 1981, it consisted of the traditional progression up the corporate ladder in a variety of executive positions and companies. Second, and beginning in 1981, I formed my own consulting company, **José E. Muñoz, Jr., Inc.**, or **JÉM, Inc.**, for short. I undertook various consulting projects in a variety of industries, some of which led to full-time assignments and employment, as will be described in detail below. Third, and beginning in 2006, I started a transition into academic life, while maintaining an active consulting practice. I served as Associate Dean of Graduate Business Education (M.B.A.) for 6 years, and now am Associate Professor in the Point Loma Nazarene University's Fermanian School of Business. As a part of the academic process, I obtained my doctorate (D.B.A.) at Anderson University (Indiana) with a concentration in Accounting.

**EMPLOYMENT - POINT LOMA NAZARENE UNIVERSITY**  
**FERMANIAN SCHOOL OF BUSINESS (2006-Present):**

**Summary:**

I served as the Associate Dean of Graduate Business Education for 6 years and now am Associate Professor of Strategy, Managerial Accounting, Finance, Healthcare Finance, and International Business in the Fermanian School of Business at Point Loma Nazarene University in San Diego, California, primarily in the MBA program.

**Major Accomplishments:**

Program size quadrupled in the 6 years I served as Associate Dean to over 140 MBA students in Fall 2012 during a tough economy while at the same time significantly raising tuition and tightening entrance standards.

Under my leadership, the PLNU MBA program entered into partnerships with Scripps Healthcare to be the exclusive MBA and MSN provider for Scripps employees and dependents. This included establishing several elective courses designed for the healthcare profession. During Fall 2013, a new one-year accelerated, full time, daytime MBA program commenced at the University's Liberty Station campus.

## EMPLOYMENT--CONSULTING-RELATED (1981-Present):

### Summary:

I am owner of my consulting firm (**JÉM, Inc.**) specializing in international and domestic business projects, utilizing a strong executive, financial, and operating background. I have worked on a range of projects in the Pacific Rim (Mexico, South America, South and Western Pacific, and USA).

### Major Accomplishments:

I currently consult for the California District of **Wright Medical Technology, Inc.**, a public medical device company involved in biologics and extremities, as well as for several private Mexican seafood aquaculture companies.

I currently serve as an expert witness for the US Department of Justice on fishery/seafood matters.

I consulted for a public company based in San Diego that operates bluefin tuna aquaculture facilities in a sustainable and eco-friendly manner in Croatia and Baja California, Mexico, destined for the high-end markets of Asia. I also consulted for **Hubbs-Sea World Research Institute**, the non-profit research arm of Sea World that is dedicated to establishing commercially viable, sustainable, eco-friendly aquaculture operations worldwide.

I served as a consultant and interim COO/CFO for start-up South Pacific Tuna Corporation, a privately owned, high-seas tuna fishing vessel management company, created to manage purse seine vessels operating under U.S. Flag in the South/Central Pacific.

I led the project team that resulted in the acquisition of **Van Camp Seafood Company (Chicken of the Sea** brand seafood) from **Ralston Purina** and served as CEO for 4 years for the second largest USA tuna company with sales in excess of \$300 million, and with operations in Indonesia, Thailand, American Samoa, Puerto Rico, and the USA.

I provided financial and administrative restructuring to a privately-held company in the giftware industry, which was emerging from bankruptcy in 1992. Annual sales grew from under \$1 million to \$150 million through internal growth and several acquisitions to become one of the premier giftware companies in the USA. During the process, I became the 3<sup>rd</sup> largest investor and a board member, in an 18-year relationship.

I co-founded and developed a Mexican abalone aquaculture project, **BC Abalone**, from a concept into a fully operating company, utilizing the expanded foreign direct investment regulations allowed under the implementation of NAFTA. The farm was built to produce 20 tons of abalone in 2004 for export almost exclusively to Asia. I served as CEO and Chairman of the Board for 12 years.

I acquired a company (**Morris Whaley, Inc.**) that manufactured deck and refrigeration equipment and provided repair services for the commercial fishing industry. The company grew in sales from under \$1 million to almost \$5 million before it was closed when the tuna fleet moved offshore.

## Chronological Detail:

1981-Present JÉM, Inc. (José E. Muñoz, Jr., Inc.)  
San Diego CA

**President & Owner.** Since 2003, other consulting services performed and clients include: strategic planning, operational, administrative, and contract CFO services for a start-up NC-based cheese processor/foodservice supplier; due diligence, strategic planning, and acquisition analysis for a Singapore-based multi-national corporation in its acquisition of a Peruvian-based seafood producer/exporter; strategic business and long-range planning for a well-known European-based international marine environmental organization; strategic planning, operational, and financial consulting for a large international giftware company and a for a small, domestic giftware start-up retailer; strategic planning, administrative, and financial consulting for a domestic apparel distributor that represents various factories in China; accounting assistance for an international Pacific Rim oil distributor; and distribution of high-end imported shellfish to select clientele in the USA.

1993-2004 BC Abalone, S.A. de C.V.  
Ejido Eréndira, Baja California, Mexico

**President, Chief Executive Officer, and Chairman of the Board** of this start-up Mexican aquaculture company located on the Pacific Coast of Baja California dedicated to the spawning, growth, and marketing of red, pink, and green abalone. Co-founded the company, which commenced sales in 2001 and was built to produce 20 tons of abalone in 2004 for export almost exclusively to Asia.

Major Accomplishments:

- Directed the operation from on-paper concept to fully operational start-up company in an industry from which foreign ownership was excluded prior to passage of NAFTA in 1993.
- Became the first wholly-foreign-owned company to receive Mexican Government approval to both operate an aquaculture facility and purchase beachfront property in Mexico.
- Responsible for raising over \$10 million in equity and debt for the project.
- Directed the sales effort in both the USA and Asia as the company commenced selling its product.

1992-2008

**The Encore Group, Inc.**

San Diego CA and Winston-Salem NC

**Investor and Member of the Board** of one of the premier giftware companies in the USA, with its well-known brands of Living Stone, Xpres, Rawcliffe, and Papel Giftware. Relationship started in 1992 with financial advice, ownership restructuring, and the obtaining of a working capital credit facility for this struggling giftware company which was just emerging from Chapter 11 Bankruptcy proceeding (then known as **Living Stone, Inc.**). Sales at the time were just under \$1 million, and have now grown to \$150 million through internal growth and acquisitions.

Major Accomplishments:

- Cleaned up the ownership of this privately-held family business.
- Obtained the first working capital line of credit for this company, which had just emerged from bankruptcy proceedings.
- Advised the company in its several profitable acquisitions, which have fueled the rapid growth in sales and the broadening of the product line.

1988-1992

**Van Camp Seafood Company, Inc. (now: Chicken of the Sea International)**

San Diego CA, Puerto Rico, American Samoa, Indonesia, Thailand

**President, Chief Executive Officer, Director** of processor, marketer, distributor of full line of canned seafood products under Chicken of the Sea label with annual sales of \$300 million. Products include canned tuna, salmon, clams, crab, oysters, shrimp, mackerel, and sardines for retail and foodservice, as well as canned pet food. Lived in New York City for 11 months and led the project team which consisted of an Indonesian international food company and a New York investment banking company (Prudential Bache).

Major Accomplishments:

- Reached an agreement in 1992 with over 30 different environmental organizations that culminated in a landmark voluntary Dolphin-Safe program unprecedented in USA industry, resulting in full-page ads in nationwide newspapers from these groups urging consumers to buy Chicken of the Sea canned tuna as they had certified the company and all its operating plants to be Dolphin-Safe.
- One third of operating profit generated in 1992 did not exist in 1988, as a result of new product introductions and line expansions into foodservice and shellfish, in spite of severely limited cash flow resulting from a highly-leveraged transaction.

- Improved company's operating profit from continuing operations by \$11 million in 3 years in spite of worsening U.S. economy and debilitating industry retail price wars.
- Restructured company's operations by selling unneeded assets, closing down unprofitable plants, and reducing G&A costs to a level \$2 million below that of a comparable-sized competitor.

**1984-1992**      **PT Mantrust**  
Jakarta, Indonesia

**Consultant/Advisor** to this multi-national Indonesian company whose packing and manufacturing operations included Green Giant mushrooms, Pepsi Cola, A&W Root Beer, Ginger Ale, Adidas, Philips TV, San Miguel Beer, and others. Developed and helped implement a 5-year plan to commercialize the country's vast tuna fishing resources into a world-wide tuna fishing and processing concern, which ultimately led to the acquisition of **Van Camp Seafood** from **Ralston Purina**.

**1981-1985**      **American Tunaboat Association & American Tuna Sales Association**  
San Diego CA

**Consultant/Advisor** and **Executive Vice President** of these 2 USA tuna boat owners' non-profit trade associations. ATA was involved in obtaining international fishing agreements, the dolphin-safe regulations, and pending legislation that affected the fishing fleet, while ATSA was involved in obtaining the highest possible fish prices for the catches of tuna by the USA fleet.

Major Accomplishments:

- Industry advisor to the U.S. State Department during very successful and sensitive negotiations with Pacific Island countries over fishing access for commercial tuna fishing boats in dolphin-safe fishing areas.
- Negotiated a 40% price increase for USA commercial tuna fleet from USA tuna canners StarKist, Chicken of the Sea, and Bumble Bee in mid-1987.

**1980-1997**      **A&M Ventures, Inc. (and predecessor Morris Whaley, Inc.)**  
San Diego CA

Acquired this specialty manufacturer of heavy deck and refrigeration equipment for the USA commercial fishing fleets and led the expansion in products and sales growth from \$1 million to over \$4 million. The company owned 17 patents worldwide, but was eventually closed as the fishing fleets moved offshore and the patents expired, to be replaced by cheaper foreign manufactured equipment.

**1980-1994**      **Clipper Oil, Inc. (and predecessor Tuna Clipper Marine, Inc.)**  
San Diego CA

Investor and Member of the Board of this distributor of marine fuels and lubricants to the international fishing fleets with annual sales of about \$15 million until the company was sold in 1994.

**EMPLOYMENT-NON-CONSULTING RELATED-PRE-1981:**

**1978-1981**      **Sun Harbor Industries (Subsidiary of Westgate California)**  
San Diego CA

Hired by the US Bankruptcy Court to serve as **CFO (Vice President Financial Administration & Treasurer)** of the fourth largest U.S. processor, marketer, and distributor of canned tuna under the Breast-O'Chicken label. Responsibilities included finance, accounting, MIS/EDP, human resources, treasury, and business planning for this profitable, operating division of the bankrupt parent company. Sun Harbor operated tuna canning facilities in San Diego CA and Ponce, Puerto Rico. (Continued teaching evening classes at **San Diego State University**. See Teaching section.)

Major Accomplishments:

- Successfully and profitably operated this division with very limited cash flow while parent (Westgate California) struggled with Chapter 11.
- Maximized return to stockholders of parent company with the successful sale of this division to various buyers, including Mitsubishi Corporation, StarKist Foods, and Bumble Bee Seafoods.

**1976-1978**      **Solar Turbines International (Division of International Harvester)**  
San Diego CA

**Controller** of manufacturer of turbines used primarily in the petroleum industry for pipeline transmission and offshore drilling platform applications. Main job responsibilities included all accounting and internal audit of the worldwide operations of this company of \$300 million in annual sales. Major accomplishment was uncovering fraud and corruption in the internal turnkey manufacturing group in the amount of millions of dollars, which led to complete restructuring of the entire company including the executive level, and prison sentences for various responsible individuals. This job was performed while under the pressure of receiving personal threats and requests to cover up the situation. Scandal resulted in Federal Grand

Jury investigation under the Federal Corrupt Practices Act. (Taught evening classes at **San Diego State University** School of Business. See Teaching section. Also started the first year of law school at the **University of San Diego**. See education section.)

**1974-1976**     **Zapata Ocean Resources, Inc. (Subsidiary of Zapata Corporation, Houston TX)**  
San Diego CA

**CFO (Vice President-Finance & Administration)** of company owning and operating fleet of 11 tuna fishing vessels, which sold their catches to the 3 major tuna canning companies, StarKist, Chicken of the Sea, and Bumble Bee. Responsibilities included accounting, finance, business planning, audit, and human resources for this division with annual sales of \$15 million. At that time was the youngest VP in Zapata Corporation. Initially, recruited away from Exxon Corporation to work for Zapata Offshore Company, but within 6 months was promoted to the VP level of this start-up division. This was the first career assignment to fully utilize my fluency in Spanish. The job required extensive travel to Puerto Rico, Central and South America.

**1972-1974**     **Exxon Corporation**  
Baytown TX and Houston TX

**Senior Staff Financial Analyst** for the U.S. domestic refining division of the world's largest petroleum company. Responsibilities included business analysis and planning primarily for the refining sector. Received 2 promotions in 2 years. (Also taught evening classes at **Prairie View A&M University's** Houston Campus. See Teaching Experience section.)

**1971-1972**     **U.S. Army**  
Fort Lee VA

**First Lieutenant** in charge of the base Central Accounting & Purchasing Office with responsibility for all accounting and purchasing for the base's 13 non-appropriated fund activities (such as the Officer's Club, NCO Club, Rod & Gun Club, etc.). Awarded the Army Commendation Medal for outstanding performance. Earned highest rifle marksmanship award. Entered as Second Lieutenant and promoted to First Lieutenant. Received Honorable Discharge at end of two-year active duty assignment. While in the Army, taught classes for the **University of Richmond** (see Teaching Experience section.).

**1969-1971**     **State of Florida Budget Bureau**  
Tallahassee FL

**Budget Analyst** in the Board of Regents university budgets section of the Department of Administration while working full time on MBA-Finance at Florida State University. Responsible for summarizing university budgets for the Florida State Legislature and monitoring performance against those budgets.

## **EDUCATION:**

### **Doctorate**

**D.B.A.-Accounting:** 2007-2016. Earned D.B.A. in Accounting at **Anderson University** (Indiana) in August 2016 after successfully presenting/defending dissertation titled "An Investigation of the Impact that the Reduction in Shares Outstanding Resulting from a Stock Buyback Program has on the Overall Changes in the Share Price Compared to the Changes in the Standard & Poor's 500 Index".

**Law School:** 1977-1978. Finished first year of law school at nights at the **University of San Diego**. Finished in top third of class. Dropped out after that due to increased travel requirements of new job at **Sun Harbor Industries**.

**C.P.A.:** 1973. State of **Texas**. Passed all 4 parts of the CPA exam on the first try, while working for **Exxon Corporation**.

**M.B.A.-Finance:** 1968-1970. **Florida State University**, Tallahassee FL. Earned the degree with a 3.5 GPA while working full-time as a Budget Analyst for the **State of Florida Budget Bureau** and with a second part-time job as a busboy at an FSU sorority house.

### **B.S.-Finance &**

**B.S.-Management:** 1964-1968. **Florida State University**, Tallahassee FL. Attended FSU on Track scholarship. Earned commission as a **Second Lieutenant in the US Army** upon graduation through the Army ROTC. Lettered in both Cross-Country and Track. Member of the FSU Varsity Club (for athletic letter-winners). President of Sigma Chi Fraternity. Member of the honorary Order of Omega. Earned the double major with a 3.0 GPA while working part-time as a busboy at an FSU sorority house.

### **High School:**

1961-1964. Graduated from **Coral Gables Senior High School**, Coral Gables FL with a 3.6 GPA. (No 5-point A's awarded then.) President of Senior Class. Named Outstanding Senior Boy. Lettered in Track for Florida State HS Championship Team. Member of National Honor Society. Graduated in Top 9% of Class. Made All-Dade County (Miami FL) Track Team.

## **ACADEMIC & TEACHING EXPERIENCE:**

**Pt. Loma Nazarene University, San Diego, CA. Former Associate Dean of Graduate Business Programs & Current Associate Professor of Strategy, Managerial Accounting, Finance, Healthcare Finance, and International Business.** Teach graduate and undergraduate classes in international business, healthcare financial management, finance, strategy, and accounting. Directed the M.B.A. program for 6 years (2007-2013) during which time enrollment quadrupled. (August, 2006-present).

**Centro de Enseñanza Técnica y Superior (CETYS), In-Class M.B.A. Program, Mexicali and Tijuana, Baja California, Mexico.** Visiting Professor of International Business and Finance. Teach M.B.A. classes in Spanish in International Business and Finance at the Tijuana and Mexicali campuses. (2010-present).

**Steinbeis University-Berlin (Germany), Online M.B.A. Program.** Avocational Lecturer in International Business, Finance, Management, and Strategy. (August, 2016-present).

**California Miramar University, M.B.A. Program, San Diego, CA.** Visiting Professor of Accounting. (2011-2013).

**National University, San Diego CA. Adjunct Professor.** Taught graduate and undergraduate classes in international business, management, accounting, and finance both online and in person, and both in English and Spanish. (2005-2009).

**Peninsula Bank of San Diego, San Diego CA. Private Instructor.** Taught financial analysis classes for the bank junior staff members seeking career improvement. (1983-1984).

**San Diego State University, Main Campus, San Diego CA. Adjunct Instructor.** Taught graduate and undergraduate cost accounting classes at the SDSU Business School in the evenings for students unable to take course-work during the day. (1976-1982).

**Prairie View A&M University, Houston Extension Campus, Houston TX. Adjunct Instructor.** Taught graduate and undergraduate accounting, finance, and statistics classes for business professionals in the Houston area. (1972-1974).

**University of Richmond, Ft. Lee Extension Campus, Ft. Lee VA. Adjunct Instructor.** Taught graduate and undergraduate accounting, finance, and statistics classes for military officers seeking to obtain degrees for career-advancement purposes. (1971-1972).

## **BOARDS OF DIRECTORS & PROFESSIONAL MEMBERSHIPS:**

### **Corporate:**

**The Encore Group**, and predecessor **Living Stone, Inc.**, privately-held giftware companies of which I own 10%, with sales of \$150 million, based in San Diego CA with manufacturing plants and offices in China, Thailand, and North Carolina. (1993-2005).

**BC Abalone, SA de CV** (Mexico) and **Servicios Acuaculturas, SA de CV** (Mexico), the abalone aquaculture company described in the Employment section. (1993-2004).

**A&M Ventures, Inc.** and predecessor **Morris Whaley, Inc.**, privately held manufacturing companies in the commercial fishing industry in which I owned 50%, with sales of \$4 million, until company closed down with departure of tuna fleets to the Western Pacific. (1980-1997).

**Clipper Oil, Inc.**, and predecessor **Tuna Clipper Marine, Inc.**, privately held marine fuel distributor, with sales of \$15 million, until the company was sold in 1994. (1980-1994).

### **Civic:**

**Project M Foundation** (2013 to present).

**San Diego International Sports Council** (Chairman-1999) (Active Board, 1990-2002; Emeritus Board, 2002 to present).

**Santa Fe Christian School Athletic Advisory Board** (2004-2006)

**YMCA of Greater San Diego County** (Vice Chairman of the Board) (1990-2004).

**Florida State University Foundation** (1992-1997).

**Florida State University Southern California Alumni Association** (1992-1997).

**University of California at San Diego Athletic Associates** (1993-1996).

**Yale University Berkely Divinity School** (1993-1995).

**St. Peter's Episcopal Church Vestry** (Chairman 1994-95) (1992-1995).

**American Lung Association of San Diego & Imperial Counties** (1978-1982).

### **Professional Academic Memberships:**

**Academy of International Business (AIB)** (2007-Present)

**Christian Business Faculty Association (CBFA)** (2007-Present)

**National Association of Business Economics (NABE)** (2008-Present)

## **PAPERS & PRESENTATIONS:**

**Doctoral Dissertation: An Investigation of the Impact that the Reduction in Shares Outstanding Resulting from a Stock Buyback Program has on the Overall Changes in the Share Price Compared to the Changes in the Standard & Poor's 500 Index**, Anderson University, Anderson, Indiana, August 4, 2016.

**Rising Influence: China and the World Economy**, *Point Loma Nazarene University Viewpoint*, October 2010, in-depth interview.

**The U.S. Tuna Industry - 1995**, *Papers of the 4<sup>th</sup> World Tuna Trade Conference*, Manila, Philippines, United Nations, Food & Agricultural Organization, Infofish, October 25-27, 1995.

**The U.S. Tuna Industry - 1993; The Period of Change and Turmoil Intensifies**, *Papers of the 3<sup>rd</sup> World Tuna Trade Conference*, Bangkok, Thailand, United Nations, Food & Agricultural Organization, Infofish, October 26-28, 1993.

**The U.S. Tuna Industry - 1990; A Year of Continuing Change**, *Papers of the 2<sup>nd</sup> World Tuna Trade Conference*, Bali, Indonesia, United Nations, Food & Agricultural Organization, Infofish, May 13-15, 1991.

**PERSONAL:**

Born in San Juan, Puerto Rico, USA, on March 3, 1946

Current Age: 70      Health: Excellent      Height: 6'3"      Weight: 192 pounds

Languages:      English-Completely fluent  
                  Spanish-Completely fluent  
                  German-Minimal conversational

I grew up in Puerto Rico, South Florida (Miami-area), and Germany (Augsburg). I have lived in San Diego for over 40 years.

I attended Florida State University on a Track Scholarship and was President of the Sigma Chi Fraternity. (More details in the Education section.)

I have been married 45 years to Lindy McCollum Muñoz, who works as an RN for Palomar Home Healthcare, assisting in overall care management for home-bound patients. Lindy graduated from Florida State University in 1970 with a BS degree and was a member of the school's synchronized swimming team and Alpha Gamma Delta Sorority.

We have 3 daughters, ages 36 (Esther Maria Winningham), 31 (Rachel Victoria Tripodi), and 29 (Sarah Ana Muñoz).

Mary is married to Michael Winningham and lives and works in San Francisco, CA, attended UC Santa Barbara with a 4.0 GPA, majoring in art and math.

Rachel is married to Joe Tripodi and lives and works in DeKalb, IL, and attended the University of Miami (Florida) on an academic scholarship. She majored in sports administration with a 3.7 GPA. She received her Masters in Education program at Northern Illinois University in 2012 where she worked in the office of special education. Rachel and her husband have two children.

Sarah attended Virginia Tech University on a volleyball scholarship and was a 4-year starter and letter-winner. She majored in interdisciplinary studies with a 2.8 GPA. She was San Diego North County Player of the Year, a Prep Volleyball High School All-American, and Captain of the California State Division V volleyball champions. She now lives in Austin, TX.

My personal hobbies include competitive cycling, reading, travel, and sporting events.

I am a certified volleyball referee for the Southern California Volleyball Association (SCVA) and the San Diego County Interscholastic Federation (SD-CIF).

I qualified for, competed in, and finished the 1983 Ironman Triathlon World Championship in Hawaii, and have completed at least 20 marathons and 20 century bicycling events.

(Last updated: September 2016)