

INVESTMENT & TREASURY FINANCE LEADER

An energetic business leader with strong experience in corporate finance, venture capital, and institutional investment. Highly regarded for utilizing business relationships, communication, analytical, organizational skills, and a strategic mindset to achieve a track record of excellence and results. Skills and qualifications include:

- Client Relationships
 - Project Management
 - Financial/Investment Analysis
 - Venture Capital
 - Business Strategy
 - Product Development
 - Team Building
 - Debt & Equity Funding
 - Capital Markets
 - Securities Lending
 - Asset Management
 - Cash Management
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PROFESSIONAL EXPERIENCE

STATE OF MICHIGAN BUREAU OF INVESTMENTS, East Lansing, MI

2018 – Present

Portfolio Manager, Fixed Income, 2018 – Present

- Responsible for the internal and external management of fixed income portfolios of the multi-billion dollar State of Michigan Retirement System pension fund.
- Aggregate information on market opportunities and conduct relative value analysis on multiple potential investments for the internally managed fund. Make recommendations by communicating qualitative and quantitative rationale.
- Research and analyze publicly and/or privately-issued debt (i.e., asset-backed securities, collateralized loan obligations, commercial and residential mortgage-backed securities, and leveraged loans). Collaborate as necessary with managers from other asset classes to fully assess the complete structure of an investment opportunity.
- Recommend external asset managers to manage portfolios of bonds and other fixed income securities. Assess manager skill, historical performance on an absolute and risk-adjusted basis, and identify the role the various strategies can play within the overall fixed-income division.
- Manage relationships and maintain dialogue with over 10 external asset managers and nearly 20 banks/broker-dealers. Conduct due diligence visits.
- Responsible for the cash management activities as needed, investing hundreds of millions of dollars on any given day. Ensure liquidity needs for the State of Michigan are met.
- Stay abreast of capital market events, world economic forecasts, industry and market forecasts, brokerage analysis, independent research, and financial reports to inform initial and ongoing investment decisions.

FORD MOTOR COMPANY, Dearborn, MI

2011 – 2017

Funding Manager, Lease Securitization-Treasury, 2015 – 2017

- Directly supported over \$15 billion of Ford Credit's funding by securitizing pools of leased vehicle assets in the U.S. and Canada.
- Led or managed 4 publicly-rated ABS issuances, working closely with the underwriting banks and syndicate desks, rating agencies, auditors, and legal counsel.
- Educated investors of ABS securities on transaction structures and related cash flows, and Ford Credit's practices to originate and support vehicle leasing.
- Led implementation of key securitization financial regulations, including Asset-level Data disclosure (Reg AB II) and Regulation Risk Retention (Dodd Frank) across each platform (Retail, Lease, and Dealer Floorplan).

Affiliate Finance Manager, 2011 – 2015

- Led debt and equity investment analysis and financings to grow or support operations across North American, South American, and European consolidated, non-consolidated, and joint venture entities.
- Monitored balance sheets, working capital needs, and opportunities to repatriate profits from affiliate entities. Coordinated closely with regional Treasurers to develop financial plans and report on actual performance metrics.
- Led cross-functional implementations of multiple complex entity restructurings involving mergers, divestitures, and de-consolidations.

- Traveled to China, Thailand, and India to review and identify opportunities to create operational efficiencies for both Ford Motor Company and Ford Credit Company within the Asia Pacific region.

MICHIGAN VENTURE CAPITAL ASSOCIATION (MVCA), Ann Arbor, MI

2006 – 2011

Executive Director

- Led all aspects of the organization and developed its effectiveness by articulating a vision to a broad range of local, regional, and national constituents.
- Managed oversight of all MVCA financial plans and cash flows with a strong intent to grow and create a sustainable, thriving organization over the 5-year business plan period.
- Successfully managed and implemented a \$2.1 million venture capital and entrepreneurial talent program to help build and diversify Michigan's economy, resulting in the success of 10 start-up companies.
- Collaborated with over 30 local and national venture capital firms to stay abreast of market conditions, build connections to fund investors and entrepreneurial executives, and grow venture capital availability through industry initiatives and public policy.
- Connected individual contacts across various stages of the capital formation spectrum; angel, venture capital and private equity both within and outside Michigan.
- Analyzed and tracked all venture capital financings, fund formations, and start-up company progress within Michigan. Worked closely with the National Venture Capital Association ensuring awareness of growth achieved.

BARCLAYS GLOBAL INVESTORS (acquired by BlackRock Financial), San Francisco, CA

1995 – 2006

Global Product Development Manager, Securities Lending, 2004 – 2006

- Designed, built, and managed a newly formed global group comprised of 10 employees to assess and implement new ideas imperative to the global business strategy and market innovation.
- Liaised with and recommended to executive leaders strategic initiatives to implement.
- Directly managed several complex and profitable lending initiatives involving opportunities with the newly created iShares funds, and in new emerging markets.

Global Product Manager, Securities Lending – Fixed Income & Repo, 2002 – 2004

- Managed 6 global employees in the lending of fixed income and repo securities to a global portfolio of 20 broker-dealers.
- Responsible for forecasting and tracking of the product's 5-year financial plan, including the reporting of key performance metrics. Achieved a revenue increase of over 30%.
- Analyzed economic factors, yield curves, and various risk-arbitrage strategies to stay abreast of fixed income market trends and potential trade opportunities.
- Collaborated closely with cash management to find and negotiate cash products for strategic term loan trades.
- Researched additional lending products and conceived of new product ideas to grow the lending portfolio.
- Identified cross-functional initiatives with cash management, portfolio management, and trading teams to encourage growth opportunities and new trade structures for the broader fixed income business.

Securities Lending Trading Manager – U.S. Equity & Corporate Bond Securities, 2000 – 2002**Securities Lending Trading Analyst – U.S. Equity, 1996 - 2000**

- Maintained and developed relationships with a portfolio of over 15 broker-dealers and negotiated loans of U.S. securities. Achieved a revenue high of nearly \$50M.
- Partnered closely and cross-trained with cash management, investing daily balances into overnight or various money market instruments based on maturity and liquidity requirements.
- Conceptualized and implemented a new Corporate Bond lending platform. Achieved over \$1B in loan balances and over \$3M in revenue by monitoring market behavior and leveraging internal and external relationships.
- Led the market into negative rebate lending to capture return in a difficult interest rate environment.

International Portfolio Accountant, 1995 – 1996

EDUCATION & TRAINING

UNIVERSITY OF MICHIGAN, ROSS SCHOOL OF BUSINESS Ann Arbor, MI
Executive Master of Business Administration, 2011

VENTURE CAPITAL INSTITUTE, 2008 Atlanta, GA (Emory University)

INDIANA UNIVERSITY Bloomington, IN
Bachelor of Science, Business and Health Finance, 1993

AFFILIATIONS

Adjunct Professor (Strategy), University of Michigan Ross School of Business, Ann Arbor, MI; 2019
Ann Arbor Summer Festival, Board Member; 2007 –2015
Peace Neighborhood Center, Board Member; 2008 –2009
New Enterprise Forum, Board Member and Entrepreneurial Coach; 2008 – 2011