

PROFESSIONAL EXPERIENCE

Financial Markets Analyst

August 2012 – Present

- Develop and implement strategies for structuring \$6 billion fixed and variable rate debt portfolio to minimize debt service costs and maintain an efficient capital structure
- Participate in the management of overall risk profile primarily relating to variable rate debt and hedging instruments
- Manage relationships and coordinate communication between executive management, investment banks, bond counsel, and financial advisors
- Strategize structures for fixed and variable rate debt financings, perform financial analysis for pricings and ongoing monitoring of economic refunding opportunities
- Responsible for interest rate swaps, caps, collars, and related hedging instruments with notional amount ranging from \$50mm to \$1.0 billion

Portfolio Analyst (contract assignment)

February 2012 - August 2012

- Constructed and monitored investment portfolios according to investment policies and client suitability, including cash
 equivalents, mutual funds, equities, and alternative investments
- Participated in meetings with asset managers and senior portfolio managers to establish and maintain client relationships
- Maintained strong knowledge and expertise of various product lines across private wealth management and banking

Corporate Account Manager

August 2009 - September 2011

- Managed corporate and executive investment accounts, conducted executive meetings, and ensured IRS, SOX, ERISA, and 404c compliance along with prospecting new business and supervised advisors
- Analyzed securities utilizing performance metrics and index benchmarks for recommendation and selection
- Secured 4 of 15 focused efforts through executive proposals and coordinated implementation resulting in AUM rising 11% from 163mm to 181mm

Premier Relationship Specialist

August 2006 - January 2008

- Assigned to premier advisor team service high net-worth clients and awarded top department rank in 2007
- Responsible for team of 8 advisors and exceeded performance benchmarks
- Zero error-correction accuracy in processed trades in high-paced and time-sensitive environment

Revenue Agent

March 2002 - August 2006

- Administered duties of collecting property and municipal taxes according to statutory codes
- Examined discrepancies in accounting by reviewing daily audits along with monthly reports and initiate departmental investigation

LICENSES/SKILLS AFFILIATIONS

FINRA Licenses - Series 7, 63, 65 & 24 Bloomberg Certified Morningstar Association for Corporate Growth Turnaround Management Association Venture Forum

EDUCATION

Master of Business Administration – Finance

December 2011

Bachelor of Arts in Criminal Justice – Double Minor: Political Science/Philosophy

April 2006