

CLIENT NAME

Street Address, State, Zip
777-777-7777 clientname@email.com

EXECUTIVE MANAGEMENT: SVP / VP / CFO Corporate Strategy, Corporate Development, Financial Management

Analytical, multifaceted business professional with over 20 years of in-depth experience developing relationships for top-tier U.S. financial services institutions and card payment companies. Well-suited with strong evaluation and planning skills, as well as expert management of both payment processing and corporate development activities. Proactive, customer-focused advisor with thorough knowledge of all areas of asset management, demonstrated attention to client and corporate goals, and a history of pursuing and achieving healthy profits.

Areas of expertise:

Banking Credit Cards Governance Infrastructure & Planning Mergers & Acquisitions
Strategic Planning & Brand Positioning Functional Cost Studies Marketing Campaign Development
Corporate Strategy & Analysis Portfolio Analysis & Management Client Services
Risk Management Asset Management Profit & Loss Accountability Revenue Gain

PROFESSIONAL EXPERIENCE

CONSULTANT Financial Consulting (Cards & Payments/M&A) 2007-Present

Administer and consult with large companies such as AT&T and several investments banks on mobile payments, merchant acquiring, and debit cards.

Led corporate development project for a large M&A virtual dataroom company and presented to sales reps.

TSYS ACQUIRING SOLUTIONS, Tempe, Arizona 2006-2007

Preeminent supplier of acquirer - payment processing, and integrated support services.

VP, Corporate Strategy

Led and managed corporate development, strategic planning, domestic and international business ventures and acquisition operations. Assessed and oversaw product profitability. Established governance infrastructure, mission, vision, values, and corporate goals. Devised and established growth strategies to propel and elevate revenues.

Championed development of governance infrastructure within 4 months after others had tried for 3 years.

Triggered \$4M/year client savings by spearheading Interchange rate analysis creating a better value proposition for core product/service.

Evaluated and recommended a \$1B acquisition; authoring Letters of Intent and Integration Plans.

WASHINGTON MUTUAL BANK, San Francisco, California 2005-2006

Top 10 national bank with \$328B in assets and the #6 credit card issuer in the US.

VP, Corporate Development

Executive management of corporate development, investment banking, financial strategy, portfolio management, and account management. Assessed and cultivated vendor relations, brand development, and process re-engineering. Instituted and oversaw pricing and contract terms for numerous partnership and co-branding credit card accounts. Led 4 direct reports.

Secured \$700M in sales of 2 underperforming credit card portfolios exceeding \$70M in profit.

Strategically identified and closed a sale of \$15M in commitments on 2 venture fund investments.

Directed due diligence of a \$6.4B acquisition, collaborating as key integration team member.

Winner of team award for closing the acquisition in record time compared to 22 previous acquisitions.

Continued...

STRATIVA, INC., Irvine, California 2002-2006

Boutique management consulting firm with 2 practices; IT decisioning and business strategy.

Practice Director, Strategy

Structured and devised B2B strategy, consumer segment analysis, product development, project planning, and team development for clients. Member of weekly Consumer Marketing Task Force for Bank of America. Supervised and mentored 10-12 employees on various critical projects.

Discovered a \$500M consumer segment of movers with a proprietary predictive model.

Realized a 400% increase in response rates by launching a campaign directed towards movers for consumer mortgages, credit cards, and checking accounts.

Hosted and led a credit card marketing seminar in Hong Kong for Chinese banks, emphasizing excellence in segmentation, risk-based pricing, and marketing campaign best practices.

BAYSHORE CONSULTING, INC., Burbank, California 1992-2001

Corporate strategy and interim management consulting firm consisting of executives from Accenture's Strategic Services Group.

Vice President / Co-Founder

Co-founded this start-up from the ground up growing to 20+ professionals. Established and chaired a monthly strategy roundtable with executives from 13 of largest credit card banks, sourcing \$200K/yr. in revenues. Attained and closed \$500K+ in billings/year. Mentored, trained, and managed new employees. Conducted extensive underwriting and syndicating activities.

Directed projects for Visa for 10+ years, including developing prepaid card products such as "Visa Cash" and "Visa Buxx," and managing Visa Functional Cost Studies.

As CFO, completed two acquisitions of over \$100M for an international telecom firm resulting in a #1 ranking on the "INC. 500 Fastest Growing Companies" list.

Devised plan for SoCal Edison to save over \$250M+ in a newly deregulated energy market.

Propelled a strategic plan to expand a pharmaceutical company tenfold to \$600M by launching globally.

Evaluated and recommended 3 overseas divestitures saving \$11M/year for Giorgio Beverly Hills.

As CFO for an Internet search optimization company, doubled revenues and realized profitability.

Re-engineered assets and created a pricing/commission strategy enhancing product profitability by 300%.

As CFO for a motion picture company, raised \$1M through Private Placement for script development.

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Career Note: Additional experience as **International Banking Officer** for The Sumitomo Mitsui Banking Corporation (1990-1991), and **Senior Accountant, CPA** for Ernst & Young, LLC (1985-1987).

EDUCATION & CREDENTIALS

MBA, International Business and Finance

University of California, Los Angeles, California
Mergers & Acquisition Internship - First Pacific Capital in Hong Kong
Field Study – Citicorp Leveraged Capital Group

BA, Business Economics

University of California, Santa Barbara, California

Training & Development

Riordan Leadership Development Program
"Leadership Through People Skills," Dimensional Management Training

