

Client Name

Address City, State, Zip Tel: (777) 777-7777 clientname@email.com

SUMMARY

Corporate Strategy/Business Development executive with 20+ years experience as well as an MBA and a CPA. Career highlights include completing multiple acquisitions valued from \$7 million to \$7 billion, developing new credit card products, writing strategic plans and mission statements, generating complex financial solutions, and mentoring and training subordinates.

PROFESSIONAL EXPERIENCE

Confidential – *Tempe, AZ*

Second largest debit and credit card transaction processor

Vice President, Corporate Strategy 2006 - 2007

Led strategic and corporate development initiatives with teams comprised of direct reports and matrixed personnel. Facilitated the establishment of corporate goals. Created new growth strategies to obtain more revenue from each transaction processed.

- Successfully developed the governance infrastructure and Mission, Vision, Values within 4 months, after many others had tried and failed in the preceding 3-year period.
- Established a better value proposition for the company's core product/service, earning clients up to \$4 million per year by inserting Interchange rate analysis into the marketing process.
- Evaluated 10 domestic and international business ventures and mergers; recommended and drafted 4 acquisition Letters of Intent; developed an Integration Plan for a \$1B acquisition.

Washington Mutual Bank - Card Services – *San Francisco, CA*

Financial services company with \$350 billion in assets and the #6 credit card issuer in the U.S.

Vice President of Corporate Development – Business Development 2005 - 2006

Led the corporate development team performing investment banking, financial strategy, and portfolio optimization analysis activities.

- Identified underperforming card accounts and completed sales of 2 credit card portfolios worth over \$700 million netting a gain of \$70 million. Conducted bidding process.
- Managed the due diligence process of the \$6.4B acquisition of Providian Financial. Key part of integration team coordinating strategic planning efforts to close the deal in record time.
- Evaluated, negotiated, and drafted pricing and terms on 3 partnership/co-brand deals.

Strativa, Inc. – *Irvine, CA*

Management consulting firm providing independent advice for business and IT decisions.

Practice Director, Strategy 2002 - 2004

Led the financial services practice developing new business and managing projects providing strategy, product development, and profitability improvement services.

- Bank of America – Identified a consumer acquisition segment of likely movers worth up to \$500 million and designed an effective target-marketing campaign around it.

- Visa Asia Pacific – Conducted credit card marketing seminar in Hong Kong for Chinese banks, introducing segmentation, risk-based pricing, and marketing campaign best practices.

Bayshore Consulting, Inc. – Los Angeles, CA

A boutique corporate strategy and interim management consulting firm formed by partners/executives from Accenture's Strategic Services Group.

Vice President

1992 - 2001

Managed corporate strategy projects and engagements for:

- VISA International – Over a 10-year period helped Visa on its mission of eliminating cash:
 - Directed the development of prepaid and stored value card products such as “Visa Cash,” “Visa Buxx,” payroll and gift cards.
 - Managed and trained teams of 3-20 people performing “Visa Functional Cost Studies.” These studies are the industry benchmark for all bankcard strategic and financial analysis.
- Citibank, JP Morgan Chase, GE Capital, Bank of America, etc. – Formed and chaired a monthly strategy roundtable of senior executives from 13 of the 15 largest credit card banks.
- Southern California Edison - Developed a strategic plan to compete in a newly deregulated energy market saving over \$250 million with potential to add \$500 million to its bottom line.
- Cardinal Health - Formulated a Board-approved strategic plan to expand internationally the radiopharmaceutical division tenfold up to \$600 million in 5 years.
- Giorgio Beverly Hills - Developed a worldwide retail business strategy saving \$11 million.
- iBrella, Inc. – As interim CFO, developed business strategy for this Internet search optimization company. Doubled revenues and brought company to profitability. Closed deals with major Internet players including Expedia, PC Mall, and Furniture.com.
- Justice Technology Corp. – As interim CFO, completed two acquisitions for this \$60 million international telecom firm resulting in a #1 ranking on the “INC. 500 Fastest Growing Companies” list. Redeployed assets and developed a pricing and commission strategy increasing product profitability 300% as well as doubling revenues and market share.

Sumitomo Mitsui Banking Corporation - Los Angeles, CA

The 8th largest bank in the world with assets of almost US\$1 trillion.

International Banking Officer - Corporate Finance and Capital Markets

1990 - 1991

- Grew a corporate finance portfolio fourfold to over \$400 million in 18 months by marketing financial products and services to senior corporate executives of Fortune 500 companies.
- Started and headed up motion picture financing, bringing in over \$100 million in new deals.

Ernst & Young, LLC - Century City, CA

Global professional services firm providing accounting, consulting, and tax solutions.

Senior Accountant, CPA

1985 - 1987

- Audited financial statements; worked on over \$1 billion of IPOs for entertainment cos.

EDUCATION

M.B.A., The Anderson School at UCLA

- *Field Study* with Citicorp Leverage Capital Group creating a marketing strategy to drive the execution of LBO and acquisition related leverage lending.
- M&A Internship for First Pacific Co. in Hong Kong. Completed three acquisitions.

B.A., UC Santa Barbara; Major: Business Economics

- Awarded Highest Honors, ODE Economics Honors, and Outstanding G.P.A. in Accounting.