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SUMMARY

Corporate Strategy and Growth Professional with 10 years of experience leading the design, development, and execution of strategic initiatives across the wealth management and private equity spaces. Strategic Leader focused on working with senior stakeholders to identify M&A opportunities, enhance operational processes, drive business expansion, and increase revenue growth.

SKILLS

- **Strategic Growth:** Growth Planning, Corporate Development, Portfolio Management, Market Research, Financial Planning & Analysis, Financial Modeling, Company Valuation, P&L Management & Forecasting, Due Diligence, Deal-Structuring, Contract Negotiation, Risk Management, Business Development, Marketing & Branding, Relationship-Building
- **Leadership:** Strategic Planning & Execution, Organizational Development, Project Management, Process Improvement, Change Management, Stakeholder Engagement, Interdepartmental Alignment, Staff Hiring & Management, Coaching & Mentorship, Budgeting & Resource Allocation, Executive Reporting
- **Technology:** Bloomberg, Factset, Tamarac, Black Diamond, Netsuite, eMoney, Vena, Fathom, Salesforce, PowerBI

PROFESSIONAL EXPERIENCE

Founder, Limestone Strategic Partners - Indianapolis, IN — **May 2024 - Present**

- Established a fractional strategic growth consulting firm serving boutique and emerging RIAs and asset managers
- Collaborate with an RIA minority investor platform to hone their branding, offer positioning, and sales deliverables.
- Built a network of industry specialists to provide clients access to 3rd party specialist service providers.
- Manage all aspects of business development for Limestone Strategic Partners, including marketing, client acquisition, and establishing the firm's brand presence in the market.

Director of Strategic Initiatives, Valeo Financial Advisors - Indianapolis, IN — **August 2022 – May 2024**

- Served as a member of the Valeo Executive Committee driving the direction and growth strategy of the firm.
- Led the systematization of financial processes by establishing the organization's first detailed budgeting process and developing a comprehensive 5-year forward-looking financial model.
- Developed and implemented forward-looking, data-driven resource management for advisor teams operating across 5 satellite office markets to standardize the allocation of office space, support advisors, and marketing dollars.
- Served as interim investment committee chair, defining a strategic plan that institutionalized the investment process, expanded offerings, and drove growth while mitigating risks and maintaining compliance.
- Oversaw risk assessment and mitigation through business process optimization as a member of the risk committee.
- Evaluated the existing tech stack and proposed a strategic overhaul aimed at streamlining the advisor experience, including the implementation of Salesforce and eMoney to standardize, consolidate, and ensure firm scalability.
- Conducted interviews with prospective team members and developed a hiring financial model to support advisor hiring needs, including creating tailored job descriptions to align with strategic growth objectives.

Senior Associate, Postlane Partners - Indianapolis, IN — **September 2020 - July 2022**

- Conducted financial and business model analysis to identify and assess potential acquisition targets and supported the M&A due diligence process in coordination with deal teams, counterparties, and service providers.
- Served as primary liaison with Panair Labs, conducting weekly check-ins and evaluating monthly/quarterly operations to monitor performance and trends.
- Successfully closed a $3.2MM acquisition for Albright's Raw Dog Food, a fast-growing raw dog food company start-up, by overseeing seller communications, drafting the LOI, creating financial models, and investigating several financing options.

Strategic Finance Manager - Crossbridge Energy Partners, Postlane Partners - Indianapolis, IN — **December 2021 - July 2022**

- Developed and refined complex M&A financial models, performed due diligence on target companies, and analyzed financial data and market trends to guide the investment strategy for 5 potential refinery acquisitions.
- Managed and enhanced the FP&A reporting process for our existing refining company by building reporting templates for additional reporting needs and implementing Vena software to reduce manual reporting time by 5 hours per month.
- Cooperated with capital investment project managers to develop financial projections focused on evaluating the production of biofuels and carbon capture/sequestration projects to lower greenhouse footprint and obtain government credits.

Strategic Initiatives Manager - Gladieux Energy, Postlane Partners - Fort Wayne, IN **September 2020 - March 2022**

- Successfully executed the sale of the company to Sunoco for $190MM in collaboration with the deal team by relaying and aggregating financial records, data, and firm strategies to the Sunoco team and participating in executive meetings.
- Eliminated 5 hours of manual data entry across finance functions, consolidated financial systems, and enhanced data analytics by leading the implementation of Gladieux's first ERP system.
- Implemented a dispatch management software solution to digitally transform truck route planning that streamlined and optimized strategic planning and helped eliminate empty loads across a fleet of 40 trucks.

Associate Portfolio Manager/Equity Analyst, Goelzer Investment Management - Indianapolis, IN **May 2017 - September 2020**

- Managed multi-asset portfolios for 225 client accounts by evaluating the tax impact of trades, trading securities to ensure client portfolios were within the tolerance of model portfolios, and designing investment allocations in alignment with the firm investment strategy and client goals, needs, and preferences.
- Improved portfolio management efficiency by selecting and deploying a new reporting/trade rebalancing system; built over 200 models, automating manual processes and enabling portfolio managers to handle 50% more client relationships.
- Supported portfolio management process with co-PMs by performing market research, meticulous risk assessment, and strategic portfolio optimization to maximize returns and safeguard assets against market volatilities.
- Performed equity research and oversaw portfolio management process for 5 active equity strategies totaling $850M AUM.
- Co-headed an internal committee to provide recommendations on new growth verticals for the asset management division by evaluating go-to-market strategies and target markets for our investment management products.

Equity Analyst, Old National Bank - Indianapolis, IN **December 2014 - May 2017**

- Performed security selection with a 5-member team overseeing a $750M AUM active equity portfolio.
- Conducted comprehensive market analysis and financial statement evaluations to optimize buy, hold, or sell decisions in alignment with investment goals and risk tolerance while ensuring portfolio diversification.
- Developed financial models and investment thesis reports to swap out, add, and eliminate positions from a large-cap equity strategy with investments in up to 50 individual equity securities as a Voting Member on the Equity Committee team.
- Created and managed 3 passive/active ETF strategies to strengthen passive investment offerings for clients; Leveraged tactical over/underweights across sectors and asset classes to provide alpha while remaining passive on security selection.
- Oversaw investment coverage for the Consumer Discretionary/Consumer Staples sectors by conducting financial analyses, market trend evaluations, and competitive positioning assessments to identify high-potential investment opportunities.
- Conducted comprehensive macroeconomic research to analyze economic indicators, monetary and fiscal policies, and global market trends, forecast economic conditions, and inform strategic investment decisions.

COMMUNITY ENGAGEMENT

President, CFA Society of Indianapolis **December 2015 - Present**

- Increased membership growth by 30% and increased average event attendance by 100% by spearheading a strategic transformation to promote an outward-facing organization that educates the community on strong investing principles.
- Quadrupled annual sponsorship revenue to $120k and enabled organizational expansion from a single executive director to a 3-person team by leading the shift to event-based sponsorships, spearheading the development of enhanced member experiences, and introducing a new local firm membership offering.
- Launched and expanded the Society's LinkedIn page to reach 1,500 followers and promote member engagement.
- Led the transition from Excel-based financial reporting to Quickbooks to streamline financial processes, eliminate manual data entry, and ensure accuracy while serving as the Society Treasurer for one year.
- Expanded the board from 12 to 24 members, focusing on diverse backgrounds and expertise. Created two senior councils to advise the board and secure industry-leading speakers.

President, Young Professionals of Central Indiana (YPCI) **March 2015 - December 2021**

- Increased paid members from 100 to 500 by doubling the event lineup to 20 events, launching new educational panels, creating an in-person networking event series, and creating individual committees to spearhead strategic growth initiatives.
- Doubled annual sponsorship revenue to $30,000+ and increased charitable donations tenfold to $10,000 per year by expanding outreach to local firms, optimizing social media, investing in videography, and holding panel education events.
- Served as the organization's first two-year President, doubling board seats from 13 to 26 to scale operations and enhance impact.

EDUCATION & CERTIFICATIONS

- **Bachelor of Science in Business, Indiana University**
  - Double Major in Finance and Economic Consulting
- **Chartered Financial Analyst (CFA), CFA Institute**
- **Certified Exit Planning Advisor (CEPA), Exit Planning Institute**