

## **MY IDEAL POSITION**

- Ability to make a solid contribution towards business growth, building high performance professional organizations, coaching future leaders, participating/leading in both strategy development and tactical execution, solving complex problems in the areas of corporate finance or corporate development.

## **BACKGROUND**

- VP Finance, Administration & Strategy & Corporate Secretary for 13 years (2005 – 2018). I was part of the executive leadership team with responsibilities in the areas of corporate finance (principal creator and administrator of all corporate pro forma, valuation models, annual budgets, business cases and revenue management models including MBS and CMB sales conduits to assess valuation, profitability and capital needs), M&A target analysis, due diligence and data room management, closing agreements, IB liaison for 6 company/portfolio acquisitions and 2 financial service entity divestitures), financial statement review, corporate development, preparation and maintenance of legal agreements (HR, Engagement, Purchase & Sale), structured finance, mortgage lending, board advisor, equity and debt financing including private placement memorandum and registration statement preparation, banking and signatory, Asset Liability Committee (ALCO) mortgage rate setting and risk hedging committee member, corporate risk management and national licensure compliance management, gatekeeper for aligning corporate strategies with functional tactics and implementation of an Infomatic reporting system, 10Q and 10K filings and preparation of MD&A and regulatory/legal compliance and liaison for two U.S. public companies over a nine-year period;
- a consulting professional engineer (M.A.Sc. Geological Engineering – Environmental) for 15 years (1989-2004) providing client solutions across a very wide industry mix (private/public sector mixed clients, multi-stakeholder management, mining, oil & gas, aerospace, multi-media, risk management, chemical and industrial manufacturing, waste management, and real estate portfolios) as a senior hydrogeologist and environmental engineer;

## **EDUCATION**

M.B.A., Richard Ivey School of Business, University of Western Ontario, Ontario, Canada, 2003.

M.A.Sc., Geological Engineering (focus on Environmental Engineering & Hydrogeology), University of Windsor, Ontario, Canada, 1990.

B.A.Sc., Geological Engineering, University of Windsor, Ontario, Canada, 1987.

## **SELECT PERFORMANCE BENCHMARKS**

1. Acquisition of a CMHC approved national mortgage lender in 2010, part of the turn-around team that drove mortgage annual origination and structured finance funding and securitization from \$188 million in 2010 to \$950 million in 2014, a 405% growth rate funding insured Canadian mortgages. Part of executive top team negotiating and closing an annual \$750 MM mortgage funding arrangement. In 2016 achieved a portfolio of mortgage assets under administration in excess of \$2.5 BB.
2. Between 2005 to 2018, participated in multiple company and portfolio acquisitions and played a lead role in a subsidiary divestiture (\$ Confidential).
3. Played lead role in managing and closing a \$1.7 MM public company private placement.
4. As VP of Finance & Administration, part of an executive team of three that lead a national mortgage brokerage to achieve a 3,993% growth rate in gross revenue (2005: \$250,000 ; 2007: \$10.3 million) and recognized in Profit Magazine's 9<sup>th</sup> annual "PROFIT HOT 50" as Canada's No. 1 Emerging Growth Company.

5. Between 1999 and 2002, as founder and managing director, raised \$1 million to build and launch a www-based real estate investment portfolio management system designed to support REIT and pension fund debt securitization processes. Winner of the 2003 BOMA Pinnacle Award for Innovation. Successfully acquired Canada's largest real estate portfolios as customers within three months following launch of company and within 6 months of new product launch, achieved \$250K in new sales, \$1.5M in outstanding proposals and developed a \$3M sales opportunity pipeline.
6. Between 1992 & 1996, as Vice President and 33% owner and Certificate of Authorization license holder of an engineering company, helped lead company growth to exceed 300 % in the first three years and revenue exceeding \$2.5 MM. Managed 150+ consulting projects on behalf of blue-chip clients ranging in budget from \$5K to \$6MM, managed and supported the career development of 15 professional staff, and positioned company for a sale that closed in 1996.

## **EXECUTIVE CAREER PATH**

### **Paladin Capital Ventures**

**2018 – Present**

#### Principal

Providing companies and investors with strategic planning, finance, board services, valuation, due diligence, risk modeling, marketing, strategic market planning, and venture capital support to help customers exceed their business expectations.

### **Radius Financial Inc. (& subsidiaries/affiliates)**

**2005 - 2018**

#### VP Finance, Administration & Strategy

With a staff of 50 employees, 45 franchisees and 1200 mortgage agents across Canada, a CMHC approved national mortgage lender (\$2.5 billion assets under administration) and national mortgage brokerage (\$6.5 billion mortgage origination annually).

### **Jacques Whitford Environment Limited**

**2002 –2004**

#### Project Officer and Senior Consultant

A multi-national consulting engineering firm (12 offices and 1200 staff) specializing in risk management, real estate services, environmental management, and geotechnical engineering services. This position was taken with the investors of eRealVantage Incorporated to provide personal cash flow and flexibility while completing my Executive MBA degree.

### **Crossflow Aero Corporation**

**2002 – 2003**

#### Finance and Marketing Consultant

Crossflow Aero Corp was an Ontario-incorporated private company that designs, manufactures and sells the most powerful light aircraft engines in their class to Sport Aviation enthusiasts worldwide. Crossflow was a small family-owned company and an early stage investment candidate that required restructuring and investment capital to meet market demands for its products and services and working capital for growth.

### **eRealVantage Incorporated**

**1999 - 2002**

#### Founder & Managing Director

As founder and managing Director, I was responsible for total product design, business analysis, user interface design, implementation, sales, marketing for a commercial real estate risk management and securitization internet software platform. The product/service won the 2003 BOMA Pinnacle Award for North America.

### **Trillium Environmental Corporation**

**1992 – 1996**

#### Founding Principal and Vice President, Certificate of Authorization Holder

A professional knowledge-based risk management and environmental consulting engineering and hydrogeology service firm.

### **Various Engineering Companies**

**1989 – 1992**

#### Professional Engineer and Senior Hydrogeologist