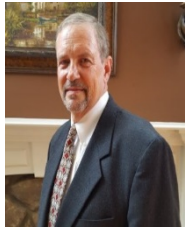


Areas of Expertise

Personal Brand | Experiences and Successes

1 of 2



Creator of Ownership DNA Culture ©:
Strategic Planning | Finance | Operations | Franchising | Mentor

Positions Held

Founder – IAWL Advisory – Ownership DNA
Dedicated to driving strategy to be owned by all personal

Founder, Simple Tie Ventures – Franchisee,
operating contracts and real estate ownership/development

Vice President –Retail Operations ARAMARK Sports & Entertainment Division of; ARAMARK \$1 Billion in Revenues

Vice President, Planning ARAMARK Sports & Entertainment Division of; ARAMARK \$10 Billion in Global Revenue

Senior Business Planner – Aramark Corporate Finance and Development

Treasury Analyst, Aramark Corporate Treasury

Senior Accountant – Aramark Corporate

Senior Auditor – Deloitte & Touche Co.

Education / Certification

M.B.A., Finance – Drexel University

BS Accounting – Drexel University

Certified Public Accountant

Stories:

- "Successfully Surviving Business Near Death Experience"
- "Does a Franchise concept Make Sense"
- "Success Hides Weaknesses"
- "Challenge Old Thinking"
- "Sonic Boomlet" - Philadelphia Inquirer 2014

Awards:

- Franchisee of the Year Award – North America Sonic Drive-In
- Business Volunteer of the Year Award – Arts & Business Council, Philadelphia

Own It: Infusing all team and stakeholders with an owners risk/reward perspective linked in "cash flow real-ville"

Core value: Aligning all members of organizations with the company vision using an "Ownership DNA Culture"© where their every action adds value

Finance:

- Participated in \$1.0 billion in leverage buyout.
- Developed analytical tool used for hedging interest rates exposure covering rates, duration, fixed vs variable positions. This encapsulated the entire debt structure of the post-LBO balance sheet
- Implemented interest rate hedging strategy. Negotiated over \$1.0 billion interest rate swaps in post-LBO.
- Managed \$450 million retirement Master Trust investments. Managed investment companies, developed new retirement plans and executed over \$75 million of insurance investment contracts
- Extensive execution of off-balance financings including \$50+ millions of equipment and roll-stock fleet leasing program
- Negotiated/executed real estate development financings for restaurant operations (both conventional and government-backed)
- Prepared multi-division (20+) projections used to support new debt offerings and renegotiations with banks and institutional investors

Strategic/Business Planning:

- Prepared strategic and business plans for high-growth division – growing division from \$300 million to \$1.0 billion in six years
- Negotiated and executed multiple acquisition of over \$350 million in revenues
- Negotiated dozens of operating facilities services contracts for new and existing clients with over \$200 million in revenues
- Identified, sponsored major strategic planning projects to improve systems and profitability
- At holding company, for all food service companies, vetted and analyzed new capital investments and new contracts, ranking and selecting projects versus cost of capital hurdles
- Operated corporate planning model combining over 30 companies used for LBO financing and \$10 billion in volume
- Prepared analyses and participated in acquisitions and divestitures, including due diligence
- Prepared market assessments of competitors, market size and potential growth targets

Operations/Culture Catalyst:

- Championed and executed major operational change in retail services operations
- Won business case for significant investments in retail talent, both in the field and at the support level (for purchasing, product development, merchandising, store design and operations). Introduced programs to drive sales: open-to-buy, planograms, visual merchandising, and new point of sale system
- Created incentive compensation programs for retail managers whereby they "owned" results
- Lead operator with over 50 locations. Tripled profits to over \$15 million
- Achieved operational, sustainable viability, with over \$80 million in new sales and record new business
- Identified and sponsored major IT project to replace inefficient legacy systems
- Created incentive compensation programs for retail managers whereby they "owned" results

Leadership Competencies:

- Creator of the Ownership DNA Culture - Unlocking the potential of team members to grow, and empowering them to step out of their comfort zone. Encouraging and challenging them to do more...better. Stretching them so they experience the freedom to finally be themselves – using their true talents to serve others.
- Establishing metrics across the business, which define, evaluate, and measure performance against the plan.
- Developed incentive compensation plans based on metrics specifically linked to adding value in achieving vision
- Addressed recent economic collapse that threatened bankruptcy by addressing entire costs structure with focus on reducing fixed costs load from debt financing. Reduced debt service by over \$1.0 million annually

INCENTIVES "OWNERSHIP DNA © CULTURE"
ALIGNMENT



Individual

