
Chief Financial Officer & Senior Executive

Sales-oriented senior finance officer with substantial experience in providing strategic corporate finance and operational leadership to both private and public companies.

Dynamic senior finance executive who operates as a true tactical partner to the CEO and Board in managing and growing entrepreneurial-based organizations. Recognized for managing challenging situations with sound fiscal and operational style including strategic positioning for acquisitions to enhance growth, reduce costs, and optimize shareholder value. Led financial functions in NASDAQ, start-up, and high growth operations. Experience in public reporting, Wall Street and investor relations. Expertise in pre-IPO organizations, family offices, raising capital, implementation of enterprise-wide information systems and multi-location operations. Strong team-building, leadership and motivation skills and robust negotiation and communication abilities. Engage with the management team to lend insight into emerging opportunities, trends, issues and challenges in the economy.

- Equity and Debt Financing
- International Team Operations
- Strategic Planning & Analysis
- Financial Modeling & Forecasting
- Investor Relations
- Start-up experience
- Chief of Staff Experience
- Family Office Management
- COO Management
- Mergers, Acquisitions & Divestitures
- Project Management
- Audit & Compliance
- Financial Planning & Analysis
- Risk Management

Career Highlights

- Led, managed and executed a challenging Initial Public Offering.
- Managed and completed successful sale of an internet-based company during the dot com bust.
- Significant contributor in growing revenue from \$30M to \$500M for a consumer-products company.
- Established and managed a family office growing the asset base from \$10M to \$2B.
- Established investment policy standards for pension and profit-sharing plans in compliance with ERISA. Selected and engaged investment managers and consultants and grew plan value from \$6 million to over \$250 million.
- Established and managed a commercial real estate portfolio with over 1M sq. ft. in retail, office and industrial property worth \$500M.
- Managed private investor relations in Europe and Asia.
- Led the presentation at an exclusive investment conference sponsored by the California Technology, Trade & Commerce Agency in London connecting the organization with strategic investors and partners in Europe.
- Successfully engaged with large Asian investors including Mitsubishi in Singapore and Japan.
- Lead and completed the exit strategy of a business and sold the technology to a European bank, netting a return of over \$1 million in cash back to investors with no lingering debt.

Professional Experience

Bauer's Intelligent Transportation, Inc, San Francisco, CA

Chief Financial Officer, Secretary and Director, 2006 - 2018

Innovative transportation company leading change in the passenger transportation marketplace.

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Directed the financial management and strategic planning for six companies under the Bauer's umbrella that provides passenger transportation services to a multitude of diverse corporate and commercial organizations including high-tech corporate employee commuter programs, private charter and special event large scale programs for music festivals, Super Bowls, PGA events, Olympics, etc. On Demand black car service for VIP's. Clients include Google, Yahoo, Cisco, Facebook, Electronic Arts, Salesforce and others.

- Created new financial and technology infrastructure critical to achieve company's growth.
- Engineered and negotiated major corporate contracts resulting in a 200 percent increase in overall revenue, generating a 55% CAGR and a corresponding 50 percent increase in profit.
- Negotiated and resolved outstanding regulatory and compliance issues with favorable outcomes resulting in substantial savings.
- Successfully raised private equity capital to grow new company in the strategic B2B transportation space.
- Led the comprehensive due diligence on all acquisitions.
- Led, managed and established all outside relationships with banking, legal, union and accounting professionals and officers.
- Established appropriate corporate governance structure.
- Filled substantial gaps in insurance and overall risk management protecting the company against significant loss.

Morgan Stanley, San Rafael, CA

Investment Management Advisor, 2003 - 2006

Served as a Subject Matter Expert providing advisory services on wealth management to high net worth individuals, retirements plans, and charitable foundations. Oversaw the development and execution of strategies focused on optimizing asset allocation. Liaised with professional money managers on behalf of clients and formalized investment policy statements. Analyzed portfolio performance against established investment goals, market indices, and manager peer group ratings. Partnered to offer enhanced private wealth management services including private client lending, structured alternative investments, family wealth advisory services, and equity structured products.

Additional Experience

Chief Financial Officer - Virtual Purchase Card, Inc.

Chief Financial Officer - SocialNet, Inc.

Chief Financial Officer, Secretary and Director - Shoe Pavilion, Inc. (NASDAQ:SHOE)

Chief Financial Officer, Secretary and Director - Byer California

Chief Investment Officer - Byer Family Office

CPAs and Advisory - Grant Thornton

Education

Bachelor of Science in Accounting

Kelley School of Business, Indiana University, Bloomington, IN

Credentials

Certified Public Accountant (CPA)

Chartered Global Management Accountant (CGMA)

Real Estate Broker (Active) - State of California