
Chief Financial Officer & Board Director

Senior executive officer with 25+ years of experience in providing leadership, management, and execution to entrepreneurial-oriented 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. Ardent team building, leadership, and motivational qualities. Robust negotiation and communication skills. Partner with the management team to lend insight into emerging opportunities, trends, issues, and challenges in the economy.

- Family Office Creation & Management
- International Team Operations
- Financial Modeling & Forecasting
- Investor Relations
- Start-up experience
- Risk Management
- COO Management
- Mergers, Acquisitions & Divestitures
- Project Management
- Equity and Debt Financing
- Financial Planning & Analysis

Career Highlights

- Significant contribution in growing revenue from \$30M to \$1 billion for a consumer-products company.
- Led, managed, and executed a challenging Initial Public Offering.
- Managed and completed successful sale of an internet-based company during the dot com bust.
- 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 \$500 million.
- Established and managed a commercial real estate portfolio with over 1M sq. ft. in retail, office, and industrial property worth \$1billion.
- 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

A pioneering transportation company driving advancements in the passenger transportation industry. 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. Internet-based applications for ridesharing management services. Clients include Google, Gilead, Cisco, Facebook, Electronic Arts, Salesforce, Uber, etc.

Morgan Stanley, San Francisco Bay Area
Investment Management Advisor

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.

Virtual Purchase Card, Inc. San Francisco Bay Area
Chief Financial Officer

Directed all financial functions for this innovative electronic payment technology company; instituted proper accounting and finance infrastructure to maintain adequate asset protection and system of internal controls. Managed relations with individual and institutional investors, both domestic and European. Negotiated strategic partnerships to raise foreign private equity capital. Directed the winding-up affairs of the company after the board of directors resolved to sell the company and technology to Rabobank.

SocialNet, Inc. San Francisco Bay Area
Chief Financial Officer

Founded by the creator of LinkedIn, recruited to collaborate with the CEO in selling this early entrant into the social networking space during the middle of the dot-com fallout. Prepared investment documents for potential acquirers; consulted with legal counsel during negotiations and closure phase of the transaction. Maintained a channel of communication with individual and institutional investors as well as secured debtholders. Navigated company through transition to new ownership, Spark Networks NYSE: LOV.

Shoe Pavilion, Inc. San Francisco Bay Area

Chief Financial Officer, Secretary and Director

Successfully led, managed, and executed the IPO of this retailer with focus on growth strategies, improving infrastructure and managing and building Wall Street and investor relations. Led and conducted analyst and investment banker conferences along with frequent meetings with institutional investors. Orchestrated an acquisition that grew store base from 78 locations in 3 states to 111 stores in 11 states, increasing revenue and net income by 15 and 8 percent respectively in the initial year.

Byer California, Inc. and Byer Family Office San Francisco, CA

Chief Financial Officer, Secretary and Director - Chief Executive Officer- Byer Family Office

Played integral management role in the dramatic expansion of this privately held woman's apparel manufacturer, with annual revenues mushrooming from \$30 million to \$1billion. As CEO of the Byer Family Office, I established, led, and managed the investment strategies of this high net-worth family and grew a \$10 million asset base to over \$2 billion. Managed the personal financial affairs of the family members, developed income and estate tax planning strategies to achieve maximum tax leverage in the FORM of GRATS. Established a 501 (c) 3 organization to manage philanthropic interests.

Grant Thornton, San Francisco, CA and St. Louis, MO

Audit Manager

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