Financial executive with a track record of building strong relationships. Combine astute strategic, business, financial, analytical, organizational and leadership competencies with proven success in cultivating relationships to achieve organizational goals and growth objectives. Acclaimed for delivering engaging two-hour finance presentations that leave audiences wanting more.

PROFESSIONAL EXPERIENCE

The Walters Art Museum. Baltimore, MD 2019 to Present
A place where people of every background can be touched by art. The Walters Art Museum engages and strengthens the community by collecting, preserving, and interpreting art.

Director of Finance
- Act as a thought partner for museum staff and board leadership by engaging in strong financial analyses that aggregate historical data, forecast future trends, and support strategic and critical decision-making.
- Establish, direct, and oversee finance functions for the Walters Art Museum to include, but not limited to, general ledger and income statements, tax returns, audits (including A-133), Form 990, cash accounting, and reports to granting agencies and institutions.
- Collaborate with the Director of Human Resources to manage the museum's retirement plan.
- Facilitate the organization-wide annual budget and audit processes
- Advancing timely, accurate financial reports that are appropriate for the intended audience.
- Developing and implementing well-formulated financial policies and procedures that support efficient, effective work through the finance department and the museum.
- Proactively recommend and implement technology and system enhancements to support the ongoing development and compliance within the Walters' finance department.

Delta Sigma Theta Sorority, Inc. Washington, DC 2013 to 2017
A global not-for-profit organization whose mission is to assist local communities throughout the world.

National Finance Chair
- Chaired the Investment Committee overseeing the management of a $20 million investment portfolio whose outperformance generated enough income to offset operating funding gaps.
- Presented over a hundred engaging presentations for fiscal officers to increase compliance with financial policies and internal control procedures.
- Participated in the hiring of senior-level personnel, including the Executive Director, the Deputy Executive Director and the Director of Intellectual Property. All three are high performing contributors to the organization.

Biegel Waller Investment Advisory Services, Columbia, MD 2015 to 2016
A financial advisory firm serving high net worth clients.

Senior Investment Analyst
- Contributed to the firm's client retention and asset growth by providing clear and concise verbal and written commentary on market activity and portfolio performance.
- Conducted maintenance research on existing strategies and due diligence screening on new product ideas. Recommended the top performing alternative investment strategy.
- Made well-informed recommendations that were accretive to the portfolio's performance.

Integra LifeSciences, Plainsboro, NJ 2012 to 2013
A medical technology company that offers solutions in orthopedics, neurosurgery, spine, reconstructive and general surgery.

Investor Relations
- Created dynamic management presentations for investor conferences to build the confidence of Wall Street investors in the company's plan to grow earnings.
- Supported the stock price by managing an earnings reporting process that delivered a clear and consistent message about the firm's growth outlook to investors.

Profit Investment Management, Silver Spring, MD 2006 to 2012
An investment management firm serving institutional clients investing in US equities.

SVP, Client Portfolio Manager (2009 to 2012)
Assistant Portfolio Manager (2007 to 2009)
Senior Equity Analyst (2006 to 2007)

- Served as the surrogate for the CEO and Portfolio Manager at current and prospective client meetings so that he could focus on improving portfolio performance and setting the strategic direction for the firm.
- Successfully managed client relationships which resulted in increases in the firm's AUM.
- Developed and employed the company's aggressive growth strategy projected to double the organization's size by 2015.
- Created performance newsletters and marketing materials for existing and prospective clients that enhanced communication, improved client retention, and drove revenue growth.
- Redesigned RFP completion and approval system that successfully completed numerous RFP's generating more than $100 Million (AUM) a year in new business. This included a 200-page RFP that resulted in a $300 million mandate.
- Improved portfolio performance by analyzing equities and selecting stocks that outperformed relevant benchmarks.
- Instituted a system to allocate a shrinking pool of trading dollars while maintaining the firm's relationship with brokers.

Holland Capital Management, Chicago, IL 2000 to 2006
An investment management firm offering both equity and fixed income portfolio management to institutional and individual investors – Firm had nearly $2 Billion in assets under management.

Senior Equity Analyst
- Reviewed the firm's investment philosophy, strategy, process, and performance with clients which improved client retention.
- Organized a collaboration of asset managers to work together (with then State Senator Barack Obama) to get IL State pension funds to allocate funds to minority asset managers. Resulted in a $400 Million increase in AUM.
- Performed fundamental analysis which significantly contributed to the portfolio's performance.
- Created analyst recruiting process that successfully identified and acquired new talent.

Deloitte & Touché, Chicago, IL 1994 to 2000
A professional service firm that provides audit, tax, consulting, enterprise risk and financial advisory services to Fortune 500 Companies – Deloitte & Touché generated nearly $12 billion in 2000 annual revenue.

Manager, Senior Consultant, Consultant
Business Valuation Group
- Managed multiple consulting projects simultaneously from business development to invoicing.
- Conducted stock/asset valuation analysis for accounting, tax, merger, litigation support, acquisition, and divestiture projects.

EDUCATION / CERTIFICATION / ORGANIZATIONS

MBA Finance & Accounting**,** Kellogg School of Management, Northwestern University
BSE Mechanical Engineering/Applied Mechanics, University of Pennsylvania
Chartered Financial Analyst (CFA)
FAR *(*formerly the Finance & Administration Roundtable*)*
Board Member, 2015-2021
Member, 2010 to Present