

Dynamic, results-driven, multi-lingual/cultural executive with over 20+ years of private and public sector management experience. Accomplished visionary with a proven track record directing the financial and business operations of a high performing, innovative and growth-oriented community development financial institution (CDFI). Respected, civic-minded leader active in multiple community initiatives and organizations both locally and nationally.

PROFESSIONAL EXPERIENCE

AltCap, Kansas City, MO

09/10 – Present

President – *Responsible for the creation, development and growth of Kansas City's first impact-driven, certified CDFI and SBA Microloan Intermediary.*

- Grew organization to \$10 million in assets (including over \$200 million off-balance sheet) in 9 years; averaging \$1.3 million in annual revenues since 2010 (increased top-line growth by 70% in 2018).
- Responsible for securing \$138 million in New Markets Tax Credits (NMTC) from CDFI Fund; closed on over \$150 million in financing transactions in Kansas City – including two small business loan funds.
- Built a small business and micro loan operation resulting in loan production of nearly \$10 million in 4 years; currently maintaining a high performing loan portfolio.
- Created and serve on the Board of Directors of Equity², AltCap's Opportunity Zone investment affiliate. Led the development of the investment thesis and strategy as well as hiring of the managing director.
- Created and served as Executive Director (currently Board Chair) of Community Capital Fund, AltCap's 501c3 community development affiliate, which has awarded nearly \$1,000,000 in grants for targeted projects and programs that support neighborhood capacity building in low- to moderate-income communities in Kansas City.
- Lead and manage a high performing team of 8-10 employees.

City of Kansas City, Missouri

01/07 – 08/10

Development Finance Project Manager – *Led the financial analysis and evaluation of the use of economic development incentives for real estate development projects as well as oversaw the development and management of a Community Development Entity (CDE) to administer a federal tax credit program.*

- Underwrote over \$500 million in publicly subsidized real estate development projects using fiscal impact modeling, risk assessment, financial analysis and tax revenue forecasting.
- Negotiated and structured development agreements including community benefit and performance/clawback agreements.
- Organized and developed a city-controlled CDE to participate in the federal NMTC Program – responsible for securing \$75 million in NMTC allocation authority from the CDFI Fund resulting in \$40 million in financing transactions.

The Seville Group, Inc., Pasadena, CA

10/04 – 02/05

Associate Program Manager – *Assessed the Los Angeles Unified School District's workforce and economic development program and designed, developed and implemented performance improvements to increase program effectiveness.*

- Created a metric-based model to measure and track program effectiveness and goals attainment.
- Initiated and facilitated sustainable strategic partnerships with community organizations and government agencies resulting in more effective delivery of program services.

Los Angeles Minority Business Enterprise Center (LAMBEC), Los Angeles, CA

03/03 – 10/04

Consultant/Program Manager – *Managed economic development programs designed to increase the capacity of minority-owned small and medium sized enterprises (SMEs).*

- Provided consulting and technical services to minority-owned SMEs including strategic and business planning, operational and financial management assistance, advanced market research and contract procurement.
- Facilitated minority-owned businesses' access to capital and contract opportunities via public and private sources resulting in debt financing and contracts totaling over \$10 million.
- Increased program effectiveness and capacity by developing high value partnerships with public & private sector institutions.

United States Peace Corps, Komarno, Slovakia

06/00 – 07/02

Small Business/Community Development Volunteer – *Worked with city and regional governments to assess and develop economic development programs and policies.*

- Conducted an assessment of local economic performance and made recommendations for local and regional economic development programs and policies.
- Assisted in the development of a local business incubator and revolving loan program resulting in the formation of a public/private sector advisory committee.

EMI Recorded Music, N.A., New York, NY

04/96 – 09/99

Royalty and Financial Accounting Supervisor – *Responsible for business unit and special projects accounting and financial analysis for U.S. based recorded music operations.*

- Coordinated and prepared financial reports including business unit income and cash flow statements, pro forma statements and budget reports as well as assisted in monthly/annual financial closings.
- Developed integrated accounting and financial management systems and processes for various business units as well as special projects in accordance with applicable business procedures and standards.
- Supervised and trained a staff of two junior accountants.

Salomon Smith Barney, Inc., New York, NY

9/95 – 01/96

Asset Management Accountant – *Responsible for the management of multimillion-dollar asset instruments including the timely and accurate calculation of daily NAVs and preparation of financial statements and reports*

EDUCATION

University of Southern California, Los Angeles, CA
Master of Public Policy, August 2006

University of Miami, Coral Gables, FL
Bachelor of Business Administration, 1995

CIVIC & COMMUNITY LEADERSHIP

Federal Reserve Bank of Kansas City, Kansas City, MO

Member, Community Development Advisory Council, (2017 – present)

IFF, Chicago, IL

Community Advisory Committee, (2016 – present)

KCPS Education Foundation, Kansas City, MO

Founding Board Member – 501c3 education foundation for Kansas City Public Schools, (2015 – 2019)

PROFESSIONAL CERTIFICATIONS

Received certified training in the following areas:

- American Bankers Association, National Commercial Lending School Graduate, (2015)
- Certification in Real Estate Finance, National Development Council, (2007)
- Building Adaptive Minority and Native American Businesses, The Tuck School of Business at Dartmouth, (2004)

SPEAKING/TEACHING ENGAGEMENTS

Recent speaking engagements:

- CCIM/MEDFA/OFN, Opportunity Zones, (2018 - 2019)
- Council of Development Finance Agencies, Missouri's New Markets Tax Credits, (2017)
- ULI Kansas City, Raising Nontraditional Capital for Your Next Project, (2015)
- Adjunct Professor, UMKC Department of Architecture, Urban Planning and Design, (2013 – Present)