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Major Accomplishments:

Financial

Peak assets under management: \$25-\$30 million for a client base of 65 clients/families. Average client asset amount was over \$400,000. Largest client had assets of over \$7 million.

Developed a proprietary, integrated Asset Accumulation and Distribution process that incorporated investment analysis, tax planning (both tactical and strategic) with tax deferred, tax free and taxable accounts. Developed a proprietary software program that supported the integration of the Asset Accumulation phase with the Retirement Distribution phase of the financial planning process.

Conducted full Financial Planning cycle including needs analysis, goal prioritization, development of alternatives and implementation of plan.

Wrote a 150 page business plan including pro forma financial statements, cash flow statements, and marketing plan.

Training/Development

Currently teaching two sections of a financial literacy class at Virginia Tech. The course is open to all majors and all grades. As a result, the class has a wide range of skills, experience and maturity levels. Despite this, my evaluations indicate student interest in personal finance is on par with other finance department courses that have a more homogeneous student population focused on financial topics.

Customized Emergency Management applications for use in client environment. Developed and delivered training on these application products.

Created training materials, manuals, and curriculum for emergency management software products. Integrated several training methods including workshops, simulations and team building into the curriculum. Designed custom screens and applications to meet client needs.

Effectively performed classroom and on-site, one-on-one training with stock brokers, stock traders, CEOs and CFOs of Fortune 500 companies on a specialized stock market quotation system. Training included customizing screens for optimal performance.

Wrote end-user training manuals to complement standard software reference manuals.

Developed custom computer banking courses for the International American University in Cyprus. This increased enrollment by 33% and generated over \$25,000 in revenue the first year of implementation.

Developed and taught a learning skills course for a small plastics company, incorporated learning styles, goal setting, and public speaking skills into the curriculum.

Taught and administered a full course load at Mount Vernon University. Over a 10 year period, taught over 15 different business courses ranging from Introduction to Business, Investment Analysis, Managerial Finance, Strategic Management and Cost Accounting.

Taught several computer courses using innovative peer tutoring and cooperative learning techniques. Students' proficiencies and grades went up on average 10%.

Entrepreneur/Business

Started and built a financial advisory services business from 2000 through 2015.

Conducted market research, competitor analysis, and product positioning for a startup CD-ROM electronic publishing company.

Raised over \$100,000 of venture capital funding for an interactive publishing company.

Negotiated licensing agreements with vendors and clients for the purchase of \$1,000,000 of equipment.

Education:

M. Ed., Concentration: Instructional Leadership, Colorado St. University, Ft. Collins, CO. 1992.

MBA, University of Maryland, College Park, MD. 1984.

BS, Finance, University of Delaware, Newark, DE. 1982.

Certified Financial Planner Designation, Metro State University, Denver, CO 1999.

Chartered Financial Analyst Charterholder, 2005.

Work Experience:

Instructor, Virginia Tech, 8/2016 – present.

Owner, The DaVinci Financial Group, Inc., 12/2000 – 10/2015.

Associate, Berkshire Financial Group, 1/1999 - 12/2000

Owner, Integrated Leveraged Technologies, 1997 - 1999.

Training Specialist, EIS International, Rockville, MD, 1996-1997.

Contract Trainer, Vanstar Corp., New York, NY, 1995.

Acting Business Department Chair, International American University, Cyprus, 1993 -1994.

Consultant and Instructor, Front Range Community College, Ft., Collins, CO, 1990-1992.

Adjunct Professor/Lecturer, Mount Vernon College, Washington, DC 1986-1989, 1992-1993.

Consultant, QueTel Corporation, Washington, DC, 1987-1988.

Consultant, Entre Computer Center, Rockville, MD, 1985.

References:

Available upon request.