

## **Business Experience**

### **Green Tree Capital**

President 1985 – Present

Green Tree Capital provides investment banking services primarily to privately-owned "middle market" companies. The firm has four areas of expertise:

1. Representing sellers of privately owned companies
2. Conducting acquisition search assignments
3. Arranging acquisition financing for transactions
4. Raising debt and equity capital from institutional investors for expansion

### **Pandick California**

Vice President, CFO & Director 1983 – 1985

Responsible for all financial matters including: accounting, financial planning and reporting, information systems, internal controls, risk management, strategic planning, and treasury management for the leading financial printer on the West Coast with plants in Los Angeles, San Francisco and Costa Mesa.

### **Meridian Marketing Corporation**

President and Director 1981 – 1983

Complete P&L responsibility for this international marketing and distribution company that served as the export arm for 35 to 40 domestic manufacturers including more than a dozen Fortune 1000 companies. Primary responsibilities included providing strategic leadership, acquiring new product lines to market and distribute, developing and maintaining existing vendor relations, formulating marketing and sales strategies and staff development.

### **ITM International**

Vice President, CFO & Director 1978 – 1981

Responsible for all financial and administrative functions: accounting, contracts, financial reporting, information systems, internal controls, risk management, legal, strategic planning, taxes and treasury management for this privately owned company with over \$150 million in sales. Its principal subsidiary distributed Caterpillar tractors, earth movers and related equipment in Angola, Botswana, Liberia, Malawi and Zambia.

### **Price Waterhouse**

Audit Manager - Small Business Department 1970 – 1978

Provided accounting, auditing and consulting services to publicly held and privately owned clients in and around New York City with revenues ranging from \$2 million \$75 million to companies in the construction, distribution, import/export, manufacturing and retail industries. The highlight was a four month tour of duty in 1975 at the Jakarta, Indonesia office auditing subsidiaries of a wide range of Fortune 500 clients of this Big Four CPA firm.

### **Merrill Lynch**

Accounting Supervisor 1966 – 1970

Responsible for controlling all bank accounts at all of the firm's branch offices in the United States and Canada.

## **Education and Professional:**

New York University - Leonard N. Stern School of Business  
MBA, Accounting – 1972

University of Massachusetts, Amherst  
BBA, General Business & Finance – 1966

New York State, CPA - 1972

## **Business, Community and Professional Activities:**

Association for Corporate Growth Global (ACG) - Board of Directors 1992 - 1997, Annual InterGrowth Conference Chairman 1997, Treasurer 1994 -1996 and Assistant Treasurer 1992 -1994

ACG Seattle Chapter - Director 2005 - 2011 and Chairman - Northwest Growth Financing Conference 2006 - 2010

ACG San Francisco Chapter - President 2001 - 2002, Director 2001 - 2004, Conference Chairman 1995 and Director 1994 - 1998

ACG Los Angeles Chapter - President 1992 - 1994, Conference Chairman 1991 &1992 and Director 1989 - 1994

Greater New York City YMCA - Director 1980 - 1982

Institute of Management Accountants - Director 1983 - 1986

Long Island City YMCA - President 1979 - 1981 and Director 1976 - 1982

Los Angeles Master Chorale - Director 1988 - 1991

Los Angeles Venture Association - President 1990 - 1991, Chairman - Annual Venture Capital Forum 1989 - 1992 and Director 1988 - 1993

Napa Valley Symphony - Director 2002 - 2004