

EXECUTIVE SUMMARY

International leveraged finance corporate & investment banking executive with 20+ years of experience leading teams through strategic execution, underwriting & syndication processes (~\$30bn in financings closed). Cultivated strong relationships with clients and key stakeholders at all levels of seniority. Bilingual French (dual French-American citizen). FINRA Series 7, 79 & 63 licensed.

PROFESSIONAL EXPERIENCE

Morgan Stanley | Executive Director, Tailored Lending

September 2022 – August 2023

- Senior member of the Privately Held Assets lending group within Tailored Lending, focused on lending against illiquid assets such as privately owned founder shares & restricted stocks, alternative investment portfolios, and aircraft
- Advised clients on the benefits and suitability of Tailored Lending as a financing solution for liquidity needs
- Implemented best practices for startup platform to evaluate transactions, underwrite credits, and monitor lending positions, as well as developed consistent tracking of opportunities reviewed
- Mentored junior staff on financial analysis, modeling, corporate cash flows and valuation analyses

Natixis Securities Americas | Director

October 2006 – September 2022

Leveraged Finance Investment Banking – Portfolio Management

January 2022 – September 2022

Leveraged Finance Investment Banking – Origination

January 2012 – December 2022

Acquisition and Strategic Finance Group

October 2006 – December 2011

- Managed portfolio of 25 clients representing ~\$500 million in commitments and generating \$15 million of revenue/year
- Structured, priced, and underwrote leveraged loan and high yield financings for private equity-backed leveraged buyouts and corporate acquisitions
- Negotiated term sheets and mandates, provided asset due diligence, proposed transaction capital structures, and prepared valuations for deals ranging from \$300 million to \$1 billion
- Coordinated Capital Commitment Committee approval processes
- Performed due diligence, including liaison with client accountants, client counsel, underwriter counsel
- Developed target list of private equity funds for marketing, and maintained active dialogue with fund principals
- Managed stressed / distressed asset credit recovery through bankruptcy proceedings & member of Steering Committees
- Mentored junior staff and help develop skill-sets

Brown Brothers Harriman | Analyst, Corporate Banking & International Risk Groups

April 2004 – October 2006

- Analyzed client credit risk & FX risk
 - Identified potential buyers and developed sales materials for client M&A
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EDUCATION

Georgetown University | Bachelor of Science in Foreign Service (May 2002) | Major: International Politics and Finance (Science, Technology and International Affairs)

VOLUNTEER ENGAGEMENTS

French Dual Language Initiative | Founder & Leader

August 2018 – Present

- Led over 150 parents and liaised with NYC Department of Education to develop a new Dual Language French program for elementary school students, and established bilingual Universal PreK program
 - Opened new French after-school public school program for children interested in French language and culture
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ADDITIONAL

- French (native speaker), Spanish (intermediate)
- FINRA Series 7, 79, 63
- Interests: running, cycling, triathlon, rock-climbing, competitive sailing