

## CHIEF OPERATING OFFICER

Challenge-driven and entrepreneurial Executive with demonstrated success driving strategic change in complex organizations. Experienced building for-profit and not-for-profit business units from scratch to scale, and transforming ideas into results for stakeholders, clients and shareholders. Articulate communicator and self-possessed leader, at ease mentoring individuals and presenting to Fortune 500 boards. Inspired by environments that seek diverse personal, cultural, ideological and professional viewpoints. Extensive local experience in North America, EMEA, India, Hong Kong and Japan. Areas of Expertise:

Executive Leadership | Corporate Strategy | Acquisition Integration | Organizational and Process Design  
Program Management | Cross-functional Collaboration | Talent Development

## EXPERIENCE

### Stand Together Foundation, USA

June 2023 – present

#### Vice President of Strategy, Arlington, VA | Atlanta, GA

Direct strategy and operations for the Foundation, a dynamic organization encompassing 75 dedicated staff and a \$65 million budget. The Foundation supports over 300 non-profits across the United States, with a strategic focus on entrepreneurship, criminal justice reform, immigration, and addiction recovery.

- Transformed the Foundation's trajectory by conducting a comprehensive reassessment of the existing business strategy, challenging assumptions, and implementing strategic updates to enhance financial clarity and realign the organization towards tangible results.
- Assumed new responsibilities for Foundation operations within 5 months of joining, subsequently spearheading a transformative redesign to optimize functionality, reduce costs, and bolster operational capabilities.
- Pioneered a cultural shift within the Foundation, fostering an environment that amplifies staff contributions to strategy, enhances operational transparency, and provides substantial career development opportunities. These efforts have not only bolstered internal cohesion but have also positioned the Foundation for sustained success and greater societal impact.

### INVESCO LTD., USA / Germany

July 2004 – April 2023

#### Head of Investment Specialized Services, Atlanta, GA, August 2014 - April 2023

Founded and led Investment Specialized Services, a 125-person, multidisciplinary function in seven countries that delivers key capabilities and drives revenue growth opportunities. Provided strategic oversight to all aspects of the organization, including revenue targets, budget, hiring, multi-year strategies, and board representation

- Built and led Invesco Indexing LLC, developing the subsidiary from concept to a recognized index provider managing over \$13B in associated assets through organic and inorganic growth, including BulletShares.
- Led the integration into Invesco of over 200 investment professionals managing \$276B in AUM through the acquisition of Guggenheim ETFs and Oppenheimer Funds.

**Chief Administrative Officer, Administration, Atlanta, GA, June 2011–August 2014**

Led C-suite-sponsored initiatives covering an array of topics, including location strategy to evaluate the firm's footprint, creating specific criteria for development of locations, and restructuring key geographies such as Invesco's London presence. Managed strategy, communications, financial reporting, and talent for administration, the firm's largest function.

- Guided enterprise center strategy to develop and expand operations and technology centers in Canada and India, increasing functional capabilities and growing headcount from 700 to more than 2000.
- Directed data strategy to transform the firm from a system-centric to a data-centric platform and culture, resulting in a major, multi-year conversion of the firm's primary back-office system.

**Global Manager of Trading Development, Frankfurt, Germany, Atlanta, GA, November 2007–June 2011**

Developed and introduced a global trading model that linked nine previously autonomous trading desks in countries into a single global function, improving best execution capabilities.

- Managed key external relationships with technology partners, research providers, and brokers.

**Project Manager, Continental Europe, Frankfurt, Germany, July 2004 - November 2007**

Spearheaded initiatives across Europe, which included divestiture of the company's custodian bank in Germany and subsequent transition of activities to third parties and other Invesco affiliates in the UK and Ireland.

- Built relationships, trust, and positive project outcomes by working in German with Frankfurt colleagues.

**ADDITIONAL RELEVANT EXPERIENCE****CLARIANT GMBH, Frankfurt, Germany**

Manager, Global Supply Chain and Process Management

**STOCKAMP & ASSOCIATES, INC., San Francisco, CA, Houston, TX, Charlotte, NC**

Associate Consultant

**THE ADVISORY BOARD COMPANY, Washington, DC**

National Systems Research Specialist

**EDUCATION**

**International Master of Business Administration (IMBA), Moore School of Business, University of South Carolina, Columbia, SC**

- Language specialization: German

**Bachelor of Arts (BA), Political Science, *summa cum laude*, Furman University, Greenville, SC**

- Concentration: Comparative Politics / US – Post-Soviet relations