

## COOPER ABBOTT

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### EDUCATION & FELLOWSHIPS

**THE WHARTON SCHOOL**, University of Pennsylvania Philadelphia, PA  
Masters of Business Administration Candidate, Triple Major: *Private Equity, Strategy & Operations* May 2001  
Awarded Class of 2001 Academic Scholarship • Global Consulting Practicum • Co-Coordinator of Business Plan Competition  
Alumni Representative • Academic Quality Circle • Member of Private Equity, Finance, China and High-Tech Clubs

**FULBRIGHT FELLOWSHIP**, U.S. Fellow to the South Pacific 1994-1997

**BROWN UNIVERSITY** Providence, RI  
Bachelor of Arts, *Magna Cum Laude* (Highest Honors) 1987-1991  
Triple Major: Industrial Organization, Anthropology & Environmental Design  
*Phi Beta Kappa* as a Junior • Class of 1933 Academic Scholarship • Ford Foundation Grant • Work Study Research Assistant

### PROFESSIONAL EXPERIENCE

**DEUTSCHE BANC ALEX. BROWN** New York, NY  
**Associate - Private Equity** Summer 2000  
Analyzed and evaluated investments, performed due diligence, created valuation models and negotiated institutional commitments for a range of private equity and venture capital portfolios for bulge-bracket global investment bank.

- Investment focus included telecom/IT, B2B, infrastructure, buyouts and fund-of-fund placements.
- Performed LBO modeling of targets, evaluated tax implications of M&A structures and impacts of exit strategies.
- Developed detailed industry research, competitive analyses and pro-forma financial assumptions.

**JACKSON-SHAW COMPANY** Dallas, TX  
**Chief Knowledge Officer – Principal Investment** 1998-1999  
Managed real estate assets for principal investment firm, including development and acquisition of office and hospitality product for REIT sales and private portfolios. Sourced equity partners and bank financing for 15 projects.

- Sourced partnership funds, bank loans and investment opportunities nationwide.
- Modeled investments and exit strategies, performed due diligence, developed deal structures and partnership agreements.
- Developed new product lines, expanding pension fund, equity and individual investor segments for \$100M/year pipeline.

**THE AMEND GROUP** Dallas, TX  
**Project Manager – Corporate Accounts** 1997-1998  
Managed, modeled and developed infrastructure strategy for rapidly growing high-tech, telecom & healthcare client groups. Specialized in difficult phasing, rapid turn-around and unique functional requirements.

- Created functional assessments and managed physical planning, construction and implementation of 750,000 SF.
- Served on Quality Committee integrating company divisions; initiated 10% timesaving strategy.

**UNITED STATES INFORMATION AGENCY** Apia, Western Samoa  
**Fulbright Fellow** 1994-1997  
Developed and directed project to re-engineer technology aid programs for cost and life-cycle savings in the South Pacific, including Samoa, Federated States of Micronesia, Guam, Tonga, Fiji and Palau.

- Created 20-nation Internet-based exchange system for information sharing (combined with United Nations program).
- Worked directly with government and indigenous officials, including Members of Parliament, Cabinet and High Chiefs.
- Developed a 50% government aid reduction scenario that increased quality and sustainability of deliverables.

**ABBOTT ARCHITECTS/PLANNERS** Sarasota, FL  
**Vice President of Business Development** 1991-1994  
Responsible for finance, strategy and client development for AIA Florida/Caribbean Honor Award design firm.

- Directed design, contract negotiation, client development & construction administration on over \$30 million in projects.
- Revenue grew 60% through targeted development, improved contracts and production efficiency.

### ADDITIONAL INFORMATION

- Contributing Author, **Florida / Caribbean AIA Journal**, **ERIC Clearinghouse** and **Clubhouse Publishing**.
- **Co-Founder** of Mercantex, a B2B reverse-logistics start-up.
- **Languages:** Samoan and conversational Spanish.
- **Interests:** culture, travel, photography, Vespas. Active in the Samoan community in the U.S. and internationally.

**A. JABBAR ABDI**  
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Philadelphia, PA 19103  
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Jabbar.Abdi.wg01@wharton.upenn.edu

### EDUCATION

**THE WHARTON SCHOOL, University of Pennsylvania** Philadelphia, PA  
**MBA Candidate, Dual Major in Finance and Entrepreneurial Management** May 2001

- Member: Private Equity Club; Entrepreneur Club; Finance Club; Technology Club.
- Member: African-American MBA Association (AAMBAA); Admissions Committee; Cohort Athletic Representative.

**HARVARD UNIVERSITY** Cambridge, MA  
**A.B. Government** June 1994

- Co-Chairman, Class of 1994 Senior Gift Fundraising Committee.
- Member: Men's Varsity Basketball and Track teams; Senior Class Committee; Undergraduate Admissions Council; Black Students Association, Black Business Association.

### EXPERIENCE

**GE EQUITY** Stamford, CT  
**Summer Associate, Media and Internet Services Group** Summer 2000

*Venture capital investment division of General Electric that invests approximately \$1B annually.*

- Analyzed early and late stage private equity investments of \$5-15 million in growth companies and other investment funds within the e-commerce, internet, media, and general consumer industries.
- Evaluated financial, operational, and competitive issues in the e-fulfillment, internet infrastructure and logistics sectors.
- Helped execute a \$10 million preferred stock investment in a leading provider of e-fulfillment services. Conducted due diligence, developed valuation models, and prepared internal approval presentation materials.
- Participated in various board meetings, investment decision reviews, and negotiation sessions.

**FIRST MANHATTAN CONSULTING GROUP** New York, NY  
**Associate** 1996 - 1999

*Management consulting firm that specializes in financial services. Clients included major retail banks and credit card issuers.*

#### **Strategy and Analysis**

- Designed and managed test telemarketing campaigns that reduced credit card risk exposure by 25%.
- Developed a customer retention campaign that led to approximately \$5 million in retained banking balances.
- Assisted in creating a small business financial services strategy for a Fortune 500 company.
- Performed analyses that evaluated suitors, market attractiveness, and synergies to defend a hostile takeover.
- Built analytical models used in developing a distribution strategy based on the evaluation of a network of branch locations.

#### **Leadership and Teamwork**

- Developed and maintained relationships with senior client management; managed and trained client teams of up to 35 people.
- Performed due diligence, data analysis, vendor negotiations, and presentation preparation.
- Coordinated team of junior analysts, oversaw report production staff, and led several internal firm development initiatives.

**FURMAN SELZ LLC** (Since acquired by ING Barings) New York, NY  
**Financial Analyst, Investment Banking Division** 1994 - 1996

*Industry areas included: automotive, financial services, general industrial, healthcare, insurance, media & technology, and retail.*

- Performed due diligence and analyzed clients' strategic alternatives, including mergers, acquisitions, divestitures, public offerings, private placements, fairness opinions, and joint venture opportunities.
- Developed valuation models including leveraged acquisition; recapitalization; pro forma merger; discounted cash flow; comparable trading and transaction analyses.
- Wrote selling memoranda for divestitures and participated in drafting purchase, sale, and public offering documents.
- Selected M&A transactions include:
  - The private sale of Rubatex Corp. to American Industrial Partners
  - Acquisition of United Video Satellite Corp. by TCI

### ADDITIONAL INFORMATION

**Leadership:** Co-Chairman for Class of 1994 Annual and 5<sup>th</sup> Reunion Fundraising Committees (raised \$1M+ over 5 yrs.).

**Volunteer Work:** Harvard Admissions Interviewer, "Helping Hands" program, "High Energy" mentoring program, NY Cares.

**Other Interests:** Sports enthusiast, music (budding jazz aficionado), domestic politics, and foreign cultures.

**TATYANA ABRAMOVA**  
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## EDUCATION

**THE WHARTON SCHOOL, University of Pennsylvania** Philadelphia, PA  
*Master of Business Administration Candidate, GMAT 750* May 2001

- First Year Honors
- Wharton e-Commerce club (VP Treasurer); Consulting club; Wharton High Growth Trek Volunteer

**RUTGERS UNIVERSITY** New Brunswick, NJ  
*BA Computer Science and Spanish, GPA 4.0/4.0, Summa Cum Laude* May 1995

- Won scholarships and graduated in the top 1% of the class while working 20 hours per week

## EXPERIENCE

**MERCER MANAGEMENT CONSULTING** San Francisco, CA  
**Summer Associate** Summer 2000

- Developed the business plan for an e-commerce spin-off of a traditional business. Built pro forma financials for a proposed business-to-business marketplace for the railroad industry
- Studied market landscape for a private equity investment in the genomics equipment space. Identified industry segments, customer priorities and disease areas that would determine the optimal targets

**GOLDMAN, SACHS & COMPANY** New York, NY  
**Programmer Analyst, Client Services Technology** 1995-1999  
*Responsible for managing systems and providing software support to internal clients*

### *Management*

- Managed design and implementation of a client services system processing up to 5,000 daily transactions of the firm's fixed income and foreign exchange business
- Led 2-4 person teams on global projects including foreign exchange and financial reporting applications
- Fostered internal client relationships to ensure user satisfaction
- Interviewed candidates and trained recent hires

### *Problem Solving*

- Reengineered payment flow within the treasury department reducing costs related to customer failure to deliver funds
- Designed customized reporting software for Goldman's Canada, Japan, and US divisions
- Reduced the run-time of a monthly batch process by 50% using Sybase performance tuning techniques
- Resolved time-critical production system malfunctions and improved system stability

### *Business Analysis and Operations*

- Analyzed regulatory requirements for financial reporting in the foreign exchange business
- Created client surveys and authored service proposals
- Conducted user acceptance tests of a client sub ledger system spanning Tokyo, London and New York

**NEW BRUNSWICK ADULT LEARNING CENTER** New Brunswick, NJ  
**Teacher's Aide** 1993-1994

- Trained Spanish-speaking students for their High School equivalence test
- Implemented a standardized testing procedure to determine students' language proficiency

## ADDITIONAL INFORMATION

- US Citizen
- Volunteered for Habitat for Humanity, taught in the Junior Achievement program
- Interests include art movies, Latin dance, 20<sup>th</sup> century literature, and linguistics

## REUBEN ADVANI

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reubenadvani@hotmail.com

## EXPERIENCE

### INDEPENDENT FINANCIAL CONSULTANT

*Financial Advisor to High Growth Businesses*

Philadelphia, PA

Summer 2001-Present

- Served as Interim-CFO of medical devices company—reduced operating expenses 20% and increased sales 50%
- Wrote business and marketing plan for overseas technical support center
- Conducted due diligence for American voice-over-IP company seeking to develop calling card and cyber cafe long distance service in Latin America

### GRUPO ADVANI LIMITADA

*President/Founder of Financial Consulting Firm Based in Latin America*

San José, Costa Rica

1997-1999

- Created valuation for metals company and advised company on sale to Brazilian conglomerate
- Developed and implemented strategic plan for Costa Rican Internet service provider resulting in 40 percent increase in net income
- Advised enterprise software company on strategic options that led to expansion into other Latin American markets
- Advised beverage company on positioning strategies in potential sale to Culligan Water Technologies

### SONY CORPORATION OF AMERICA

*Senior Financial Analyst, Strategic Planning & New Business Development*

New York, NY

1996-1997

- Performed analysis to determine viability of new Sony business ventures
- Worked extensively with CFO of Sony Corporation of America to develop internal option pricing model
- Developed business model and allocated \$10 million operating budget for www.station.sony.com, Sony's online entertainment company—resulted in 100,000 hits in first month
- Youngest member of executive steering committee designed to define and implement Sony's Internet strategy

### MORGAN STANLEY & CO., INC.

*Financial Analyst, Corporate Finance Division*

New York, NY

1994-1996

- Developed and prepared complex valuation and financial models including research and strategic analysis in connection with M&A assignments, equity and debt offerings and new business presentations
- Engaged in deal structuring, negotiations and due diligence for Fortune 500 companies
- Interacted individually with senior management of corporate clients on various transactions, including acquisitions, divestitures, leveraged buyouts, hostile situations, defensive strategies and capital raising
- Performed valuation analysis on acquisition target companies and presented findings to Morgan Stanley clients
- Coordinated with traders and bankers to determine investor demand for particular issues
- Conducted M&A due diligence, prepared selling memorandums, participated in negotiations and drafted prospectuses for equity and debt offerings
- Selected as chair of analyst recruiting committee
- Transaction experience includes secondary stock offering for Sunoco, Inc., debt shelf for Cisco Systems and sale of assets for Penn Virginia

## EDUCATION

### THE WHARTON SCHOOL, University of Pennsylvania

*Master of Business Administration*

Philadelphia, PA

May 2001

- Private Equity Club, Entrepreneurship Club, Latin American Business Club, India Club, Global Consulting Practicum
- Summer Internship with Latin American Venture Capital Fund

### YALE UNIVERSITY

*Bachelor of Arts, Political Science*

New Haven, CT

May 1994

- Senior Thesis: "Coca-Cola and India: A Story of Modernization and Dependency"
- Yale Powerlifting (Founder), Yale College Council, A&H T-Shirts (Founder)

## ADDITIONAL INFORMATION

- Taught English to primary and secondary students in Costa Rican grade school 1998-1999
- Fluent in Spanish
- Interests include creative writing, cooking, skiing and scuba diving

**MAZIAR AKRAM**  
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**EDUCATION**

**THE WHARTON SCHOOL, University of Pennsylvania**

Philadelphia, PA  
May, 2001

M.B.A. Candidate, Finance Major

- Active member of the Finance Club and the Wharton Community Consultants.
- China Global Immersion Program Participant.
- Inner-city high school tutoring/mentoring, "Say Yes to Education" Program.

**PRINCETON UNIVERSITY**

Princeton, NJ  
May, 1995

B.A. Physical Chemistry, Overall GPA: 3.7/4.0 (*Cum Laude*)

Minor in the Woodrow Wilson School of Public and International Affairs, Minor in Near Eastern Studies

- Elected President of Society of Persian Americans.
- Managed daily operations of chemistry laboratories for 400 students.
- Organized cultural presentations and discussion panels.

**EXPERIENCE**

**WASSERSTEIN PERELLA MERCHANT BANKING**

New York, NY  
June-August, 2000

**U.S. EQUITY PARTNERS, L.P.**

*Summer Associate*

- Developed LBO models and returns analyses and performed due diligence to evaluate investments in a \$1 billion telecommunication company.
- Evaluated strategic alternatives and built financial models to address a \$150 million equity refinancing deal for a \$2 billion OEM automotive supplier.
- Analyzed and prepared reports on several early-stage business plans for the Venture Capital Group.
- Assisted the management team of four portfolio Internet companies on business strategy, operating costs, marketing techniques and resource management.

**ERNST & YOUNG LLP**

Washington, DC  
November, 1995-August, 1999

*Senior Associate*

Project Manager in Internal Strategic Planning

***Strategy and Implementation***

- Devised and evaluated competitive business strategies in capacity management for the Tax Compliance Practice, a \$350 million business unit of Ernst & Young.
- Formulated a strategy that enabled the Tax Compliance Practice to improve resource allocation and utilization by 10%.
- Implemented a \$900,000 web-based capacity management system for the two thousand employees that improved the bottom-line by 2%.
- Redesigned an employee scheduling process that improved business process efficiency by 5% and increased the yearly employee retention rate by 3%.
- Redirected a failing \$700,000 internal project by implementing a new strategic direction and by employing outside expertise in information technology.

***Leadership Skills***

- Managed a team of six and coordinated vendor-client relationship.
- Hired and managed independent consultants and administration teams.
- Negotiated with vendor to curtail project costs by \$100,000.
- Presented strategy plans, business process specifications and project progress to senior management at Ernst & Young.
- Conducted firm-wide training sessions for groups of 150 employees to introduce new business processes.

***Analytical Skills***

- Performed cost-benefit evaluations for a wide variety of proposed strategies and changes in business processes.
- Developed NPV models and discounted cash-flow analysis for strategies devised.
- Forecasted market demand and built financial projections for the Tax Compliance Practice.

**ADDITIONAL INFORMATION**

- The United Nations/The World Health Organization, Geneva, Switzerland. Summer Intern: Involved in designing emergency relief plans for developing countries.
- Fluent in Persian, French and Urdu/Hindi.
- Extensive travel in the US, Western Europe, the Middle East and the Far East.
- French Civilization and History course work, Sorbonne University, Paris, France.

**LUIS G. ALBAN**  
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### EDUCATION

**THE WHARTON SCHOOL, University of Pennsylvania** Philadelphia, PA  
MBA Candidate. Major in Finance May 2001

**PONTIFICIA UNIVERSIDAD CATOLICA DEL PERU** Lima, PERU  
Bachelor of Social Sciences with mention in Economics. Ranked top 10% of class. June 1996

### EXPERIENCE

**TERRA NETWORKS. *Internet Portal*** Miami, FL  
**Summer Associate. E-commerce, Strategic Alliances and New Ventures Department** July-August 2000

- Analyzed alliances and started negotiations with potential partners for vertical portals within Terra's domain.
- Collaborated in the definition of the new e-commerce store for the US Division of the portal and researched new ventures opportunities within the ISP strategy of the company.

**MCKINSEY & CO. *Consulting*** Buenos Aires, ARGENTINA  
**Summer Associate** May-July 2000

- Developed and helped to implement an optimized strategy for allocating Capital Expenditure in a Major Chilean Telco.
- Completed a valuation by comparables used as a benchmark for the spin off of the technological division of a Major Chilean Telco.

**INTERINVEST S.A. *Investment Banking*** Lima, PERU  
**Senior Analyst** 1996-1999

- Led successfully the privatization process of Dominican Republic's largest wheat mill company in a US\$40 million transaction. This project constituted the first privatization held in this country and began a comprehensive state reform process. Also, led the advising process to the Dominican Republic government on the privatization of three state-owned cigar companies.
- Executed the valuation and acquisition process of a US\$25 million Peruvian sugar cane company on behalf of a major Colombian sugar cane investor. This transaction was the first privatization in the Peruvian sugar sector.
- Coordinated and managed the team that structured and placed US\$ 60 million bonds of the largest cement company in Peru.

**CIA MINERA ABASTECEDORA ANDINA. *Non-metallic minerals' processor start up*** Lima, PERU  
**Member of the Board of Directors & Manager** 1993-1999

- Founded family owned company that processes and sells carbonate calcium and talc for the construction industry.

**ACIPRENSA. *Catholic Press Service.*** Lima - PERU  
**Sales and Promotions Manager** 1988-1989

- Managed Customer Service Area, supervising subscriptions, distributions, and sales of a biweekly Catholic Bulletin.
- Designed computer system for subscriptions and deliveries.

### ADDITIONAL

- Spent a full-time spiritual retreat with a community of 20 people from 1990 to 1992. Studied theology, philosophy, History, and Christian doctrine. Administered the community's resources and led groups with over 50 members in humanitarian campaigns to help shantytowns' development.
- Passionate about Classical Music. Enjoys reading Latin American Literature.
- Webmaster of the Wharton Latin American Student Association's Web page (<http://www.whalasa.com>)
- Active sports: soccer and jogging. Languages: English (fluent), Spanish (native).

## MURTAZAALI

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## EDUCATION

**The Wharton School, University of Pennsylvania** Philadelphia, PA  
MBA Candidate May 2001

- Dual Major in Strategic Management and Marketing
- E-Club and Marketing Club Member; Admissions Volunteer; Wharton First Year Honors recipient

**University of Pennsylvania** Philadelphia, PA

B.S.E. Chemical Engineering Summa Cum Laude May 1995

- American Institute of Chemical Engineers Outstanding Senior Award; Tau Beta Pi National Engineering Honor Society; Captain of the Penn Cricket Team

## EXPERIENCE

**BizRate.com** Los Angeles, CA

*Marketing Intern* Summer 2000

### Online Marketing

- Optimized targeted online buy to increase site traffic by 10%, while maintaining BizRate.com's strict cost per action and volume criteria
- Identified various partners for banner advertising based on cost efficiency as well as scalability

### Offline Promotions

- Managed the content and promotion of BizRate.com's first ever 250 -page guide to the 'Best of Online Shopping' rating over 700 e-commerce retailers across twenty different product categories
- Developed a unique retailer-funded newspaper insert promoting 25 different e-commerce retailers and reaching 10 million targeted households in major markets across the United States

**Sears, Roebuck and Company** Hoffman Estates, IL

*Analyst - Strategy/Business Analysis, Sears Credit* 1997 -1999

- Led across-functional team through the development of Sears Credit's first set of customer-based pricing strategies to target potential Sears Card customers
- Jointly led across-functional team to improve customer segmentation, resulting in an annual increase of \$15MM in profits
- Developed financial model to increase penetration of potential customer base, resulting in annual revenue increases of up to 50%
- Refined direct mail customer mix increasing annual profits by \$2MM

**Bain and Company** Chicago, IL

*Associate Consultant* 1995 -1997

- Jointly identified potential revenue opportunities of \$1.7B in previously under-penetrated markets for a national retailer
- Analyzed customer needs and competitor dynamics in under-penetrated markets across the country through store visits and interviews with store managers
- Led customer needs analysis with a marketing research firm and identified growth opportunities for retailer in industrial sales
- Defined entirely new product mix for client's stores based on competitor best practices and customer needs

## ADDITIONAL INFORMATION

- Fluent in Urdu and Hindi; working knowledge of French
- Extensive computer experience - developed web software published and released in 1998
- City Year Volunteer; enjoy running, squash and weight training

## ILDEFONSO MARTIN B. ALINDOGAN

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### EDUCATION

#### THE WHARTON SCHOOL, University of Pennsylvania

Master in Business Administration Candidate – Major in Finance

Activities: Teaching Assistant for Finance Department, Finance Club, and International Admissions Committee

Philadelphia, PA

May 2001

#### ATENEO DE MANILA UNIVERSITY

Bachelor of Science in Management Engineering (Honors Program)

- Most selective business course (Top 15% of Class) in the country's top university

Manila, Philippines

March 1996

### EXPERIENCE

#### GOLDMAN, SACHS & CO.

Investment Banking Division – Summer Associate

Hong Kong and Singapore

Summer 2000

- Participated in a \$6 billion privatization through an IPO of Hong Kong's leading mass transportation provider. Prepared the research analyst presentation, assisted in the development of the equity story, and drafted the commitments committee memorandum.
- Executed proposed sell-side M&A transaction for a leading Asian beer and spirits company. Prepared fairness opinion valuation, formulated buy-in structure alternatives, and facilitated due diligence process.
- Performed pro forma financial analysis and developed merger models between two leading Asian Internet portals.
- Evaluated strategic acquisitions for a \$13 billion Asian airline. Analyzed potential targets and constructed merger plans for a selected group of candidates.

#### JARDINE FLEMING GROUP, INC.

Investment Banking Division - Analyst

Manila, Philippines

July 1998 – July 1999

##### Private Equity

- Acted as sell-side financial advisor to the Philippine's leading airline operator in its \$200 million recapitalization.
- Executed the company valuation, prepared the prospectus, and negotiated with prospective investors.

##### Mergers and Acquisitions

- Analyzed, structured, and negotiated a local joint venture (JV) between two leading French and Filipino radio operators.
- Conducted an analysis of the broadcasting industry, formulated a JV structure to conform to foreign-entity ownership restrictions, and performed the valuation.
- Advised on a multinational bank's entry in to the Philippine market through the acquisition of a local bank. Mandate included the selection and evaluation of potential target banks, facilitating negotiations, and formulating an indicative range of values.

#### ARTHUR ANDERSEN & CO.

Strategy and Financial Consulting Group – Senior Consultant

Manila, Philippines

July 1996 – July 1998

##### Internal Business Review/Valuation

- Executed a comprehensive internal business review of a leading construction-supplier/construction firm covering the marketing, operations, and finance functional areas. Identified key areas of improvement and needed synergies across business units.
- Conducted the valuation of the five major business units. – P1 billion Pesos

##### Market Opportunity Assessment-Feasibility Study

- Conducted a feasibility study on Bingo operations in several provincial locations. Looked at market receptiveness, competitive situation, operational and technical requirements, and the financial viability of the proposed project.
- Performed a feasibility study for a leading property developer on a planned economic zone. Looked at the overall current and future demand and supply scenario and the optimum mix of potential industrial locators.
- Worked on a strategic industry analysis of the local duty-free sector for a leading premium retail company. Specific focus was on the analysis of consumer behavior, the operations and strategies of major industry players, implications of the GATT trade liberalization, and relevant macroeconomic developments.
- Conducted a study for a real estate developer on the possible uses for properties held in the Philippines' fastest growing provincial regions. Analyzed pertinent macroeconomic information, developmental trends, and site-specific characteristics in coming up with viable strategic options.

##### Operations Review/Franchise Package

- Performed an in-depth review of an audio retailer's operations to identify and address areas for improvement in preparation for franchising. Formulated the franchising agreement and prepared a detailed operations manual.

### PERSONAL

- Enjoys experiencing gourmet cuisine. Fanatic NBA fan. Avid golfer.

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## EDUCATION

**THEWHARTONSCHOOL,UniversityofPennsylvania** Philadelphia,PA  
*MBACandidate,dualmajorin FinanceandEntrepreneurialManagement* May2001

- AwardedFulbrightscholarshipfor2000andFundaciónRamónArecesfor2001
- TAOofProfessorIsikInselbagforAdvancedCorporateFinance.Co -ChairofWGAInternationalAdmissions.  
InterviewerasAdmissionsGraduateAssistant.EuropeanClubProfessionalRepresentative.

**UNED.UniversidadNacionaldeEducaciónaDistancia** Madrid,Spain  
*BAinLaw* 1993-199

**ICADE.UniversidadPontificiaComillas** Madrid,Spain  
*BSinBusinessAdministration,majorinFinance* 1991-1996

## EXPERIENCE

**MERRILLLYNCHINTERNATIONAL** London,UK  
*SummerAssociate ,M&A* 2000

- Performedvaluationmodelsofa\$5bnLatinAmericanEnergyandPowertargetforaSpanishconsortiumand presentedthemtotheclientonabuy -sidemandate.
- Coordinatedinformationflowwithothermembersofthebuyingc onsortiumandtheiradvisors,activelyparticipated innegotiationsbetweenthepartiesandwiththesell -sideadvisors.
- Designeddataroomstrategyandassessedimpactofnewinformationinthebuyingprocess.
- Preparedsuccessfulpitchforasellmandate ofapprivatelyheldSwedishtelecommunicationscompany.
- DevelopedmergerpresentationtoaSpanishcorporationintheMediasector.

**NATWESTMARKETS (HawkpointPartnerssinceApril1998)** London,UK  
*Analyst,MergersandAcquisitio ns* 1997-1999

- PerformedvaluationofMexicanSoutheastAirportGroupfortheinternationalconsortiumledbyCopenhagen Airportthatbecamethesuccessfulbidderintheprivatizationprocess.
- DevelopedLBOmodel,analyzedcapitalstructureanddraftedofferdocumentforPhildrewVenturesandUPF's managementteamon\$72.8mUPFMBO.Offerdeclaredwhollyunconditionalwithintwoweeks.
- PresentedbuyoutopportunitiestoUKventurecapitalfirmsandparticipatedinorigin ationactivities.

**BANQUEARJIL&CIEESPAGNE** Madrid,Spain  
*Analyst,MergersandAcquisitions* 1996-1997

- IdentifiedpotentialSpanishtargetsforaFrenchdistributiongroupandparticipatedinacquisi tionnegotiations.
- Performedvaluationsofmedium -sizedcompaniesforpotentialacquisitionsinSpain,ItalyandFrance.

## ADDITIONALINFORMATION

**ROTARYINTERNATIONAL** Madrid,Spain  
*PresidentofInternationalCommittee. RotaractClubMadridVelázquez.* 1997-present

- Ledteamonathree -weektriptoKenyaforprojectdevelopmentin1999.
- CoordinatedClub'sfundraisingactivitiesduring1999and2000tobuildadormitory -schoolinTurkana,Kenya.

**Languages:** NativeSpanish,fluentEnglish,advancedItalianandintermediateFrench.

**SecuritiesRepresentative** certifiedbytheSFA(equivalenttoUSSeries7)and **RegisteredLawyer** inSpain.

**OtherInterests:** ItalianRenaissance,traveling,skiing.

## NEILAMIN

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•Telephone:(215)417 -8130 •Email:neil38@wharton.upenn.edu

### Education

The Wharton School, University of Pennsylvania,

Philadelphia, PA

Master of Business Administration Candidate May 2001

- Dual Major in Finance and Real Estate
- Sub-matriculation Program: One of five students selected.
- Co-Chairperson of Finance: Wharton India Economic Forum
- Member Graduate Soccer Team, Sales and Trading Club, Real Estate Club
- Selected by Dean's Advisory Board to teach finance interview preparation course
- Teaching Assistant: Fixed Income Securities, Monetary Economics, and Advanced Corporate Finance

The Wharton School, University of Pennsylvania,

Philadelphia, PA

Bachelor of Science in Economics

May 2000

- Summa Cum Laude, Dean's List 1997 -1999
- Semi-finalist: Wharton Business Plan Competition and Entrepreneurial Coaching Initiative
- Analyzed REIT implications for S -corporations in a Finance Independent Study
- Co-Founder: Rotaract Community Service Club

### Work Experience

Goldman, Sachs & Co.

New York, NY

Summer Associate, Principal Finance

June 2000 - August 2000

Responsibilities Included:

- Evaluating commercial finance investment opportunities by analyzing default rates, vintage graphs and prepayment models.
- Building pricing models for examining funding costs across currency markets.
- Working with clients and senior banker to develop presentations analyzing strategic investment opportunities.
- Researching and evaluating assets for possible inclusion in structured transactions.

Selected Transaction Experiences:

- Developed debt IPO presentation for funding strategic acquisitions in the consumer products industry.
- Analyzed potential investments for inclusion in an arbitrage Commercial Debt Obligation (CDO).
- Examined funding options and arbitrage opportunities across currency markets for major aerospace firm.
- Created presentation outlining rating agency methodology for evaluating credit derivatives.

Credit Suisse First Boston Technology Group

Palo Alto, CA

Summer Analyst, Mergers and Acquisitions Group

May 1999 - August 1999

Responsibilities Included:

- Building pro -form purchase and pooling merger models utilizing comparable company, precedent transaction, leverage buyout, discounted cash flow and EPS accretion/dilution analyses.
- Working with clients to analyze strategic issues and quantify synergistic effects of mergers.
- Creating and presenting pitches to venture capital firms.

Selected Transaction Experiences:

- Developed merger models for a \$2 billion "merger of equals" in the semiconductor industry.
- Performed sell -side evaluation of a \$4 billion Internet company.
- Participated in the third round financing of a unified messaging service firm.
- Evaluated numerous potential private acquisitions for an Internet portal site.

### Personal

Interests include card games, tabla, and mogul skiing. Habitat for Humanity volunteer. Traveled extensively throughout Western Europe, Scandinavia, Caribbean, Far East and Indonesia. Training for Malibu Sprint Triathlon. Proficient in Bloomberg, Microsoft Office, and Visual Basic.

**DAVID ARDAYFIO**  
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## EDUCATION

**THE WHARTON SCHOOL, University of Pennsylvania** Philadelphia, PA  
**Master of Business Administration Candidate, Finance Major** May 2001

- Robert A. Toigo Foundation Fellow.
- Finance Club, Investment Management Club.

**UNITED STATES MILITARY ACADEMY** West Point, NY  
**Bachelor of Science, Quantitative Economics** May 1994

- Dean's List – 3 Years.
- Men's Varsity Basketball, Captain, Four-year letter winner.
- One of five nationally selected for NCAA Postgraduate Scholarship Award.

## EXPERIENCE

**DEUTSCHE BANC ALEX. BROWN** Baltimore, MD  
**Investment Banking Associate, Telecommunications and Industrials** Summer 2000

- Contributed to client presentations, selling memorandum and roadshow in the Internet Infrastructure Sector.
- Assisted in executing three transactions, including a private equity financing, initial public offering and sell side M&A assignment, ranging from approximately \$20 million to \$300 million.
- Developed detailed M&A financial valuation for the sale of an environmental services company.
- Performed financing and valuation analysis, including pro forma transaction modeling, comparable company valuations, financial projections and sensitivity analysis.

**UNITED STATES ARMY OFFICER, CAPTAIN**  
**Admissions Officer** West Point, NY  
United States Military Academy Office of Admissions 1998-1999

- Led programs in over 100 inner city high schools that stressed the importance of a higher education and increased awareness of the United States Military Academy.
- Evaluated and interviewed over 300 applicants for potential admission into West Point.

**Personnel Manager** Fort Carson, CO  
Battalion Staff Officer 1996-1998

- Directed all personnel management for an 1150 soldier military organization. Created automated accountability system which achieved 50% improvement in timeliness and accuracy of personnel actions.
- Rated best of 24 lieutenants in battalion of 1150 soldiers.

**Platoon Leader** Fort Carson, CO  
Supply Officer 1995-1996

- Led a fuel transporting section consisting of 30 drivers and mechanics. Supervised the operation, maintenance and deployment of 20 Bulk Fuel Tanks valued at \$3 million. Designated as Honor Graduate in Officer Basic Course.

**Mathematics Instructor** Fort Monmouth, NJ  
United States Military Academy Preparatory School 1994-1995

- Instructed over 100 cadet candidates at the United States Military Academy Preparatory School.
- Taught Algebra 2, Calculus, Discrete Dynamical Systems, Geometry and Trigonometry.

## ADDITIONAL INFORMATION

- **Interests:** Collecting Quotations, Golf, Basketball, Fellowship of Christian Athletes
- **Community Activities:** Urban League, Special Olympics, Ron Burton Training Village
- **Other:** Successfully ran a tutoring service for international high school. Lived in West Africa (Ghana, Liberia)

**ARI ROPHIAN ARIWIBOWO**  
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### **EDUCATION**

**THE WHARTON SCHOOL, University of Pennsylvania** Philadelphia, PA  
**M.B.A. Candidate** with Concentration in Entrepreneurial and Strategic Management May 2001  
Vice President (Corporate Liaison), Wharton Asian Business Conference.  
Elected cohort photographer, member Consulting Club, Southeast Asia Club and Cigar Club.

**UNIVERSITY OF PENNSYLVANIA** Philadelphia, PA  
**B.Sc** in Systems Science Engineering and Finance (Management and Technology Program) 1990 - 1995

### **EXPERIENCE**

**BAIN & COMPANY** Singapore  
**Summer Associate** Summer 2000

*Member of a nine-person team in strategic transformation project of Malaysia's third largest bank.*

- Worked closely with \$800 million Islamic Banking Division to assess its potential and redirect its strategy.
- Conducted competitor and market studies, and recommended fundamental changes to division's market focus, product costing, interest risk hedging, and human resource deployment.
- Formulated a new growth strategy that aims to double the division's asset and profitability within five years.
- Successfully presented strategy and recommendations to senior management.

**SEMBCORP INDUSTRIES** Singapore  
**Senior Manager**, Karimun Marine & Industrial Complex 1997 - 1999

*A \$ 150 million industrial complex targeted at marine and heavy industries in Karimun Island, Indonesia.*

- Refocused company's development and marketing strategy, and led its turnaround despite the Asian crisis.
- Led team to develop marketing pipeline consisting of 12 projects totaling \$200 million investment.
- Reorganized marketing department and reduced annual expenditures from \$1.2 million to \$720,000.
- Briefed senior management and shareholders on Indonesia's political and economic crisis.

**Marketing Manager**, Vietnam Singapore Industrial Park 1995 - 1997

*A \$ 300 million industrial park that is the first joint project between Singapore and Vietnam governments.*

- Developed company's marketing and pricing strategies and helped start up its marketing department.
- Trained and led team to become the industrial park's highest performing marketing team, securing 20 projects with a total investment of \$260 million.
- Performed competitor, market segmentation, and targeting studies for the company.
- Coordinated design and production of the industrial park's brochures, presentation slides, and website.

**MINISTRY OF INDUSTRY AND TRADE** Jakarta, Indonesia  
**Voluntary Advisor**, Indonesian Electronic Development Corporation (IEDC) 1996 - Present

*A non-profit organization that promotes investment into Indonesia's electronic industry.*

- Co-founded IEDC under the auspices of Indonesia's Ministry of Industry and Trade.
- Designed and implemented innovative concept of investment promotion.
- Trained and advised organization on conceptual, organizational, and operational issues.

### **ADDITIONAL INFORMATION**

**Startup Experience:** Co-founded company in business advisory services, consumer goods distribution, and international trading in Indonesia during Summer 1999.

**Community Organization:** Founding member of the Singapore Penn Club, member of Indonesia's Independent Committee of Election Observers and Club Rainbow of Singapore.

**Language skills:** Fluent in Indonesian, conversant in Javanese.

**Interests:** Enjoy reading, golf, sailing, and traveling. Semi-professional photographer.

**ALEXANDER H. ASPLUND**  
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## EDUCATION

**THE WHARTON SCHOOL**, University of Pennsylvania Philadelphia, PA  
MBA Candidate, Majors in Strategic Management and Finance May 2001  
PhD Marcus Wallenberg Scholar, Sweden's most prestigious scholarship for business education.  
Member of the Consulting Club, Mergers & Acquisitions Club, Entrepreneurship Club, Soccer Team

**ROYAL INSTITUTE OF TECHNOLOGY**, Stockholm, Sweden  
Master of Science, Civil Engineering and Project Management June 1995  
Managed Public Relations and Advertising for the Student Theatre Group and the Tour Committee

**ECOLE SPECIALE DES TRAVAUX PUBLICS** Paris, France  
Erasmus International Scholar, Civil Engineering and Project Management 1993-1994

## EXPERIENCE

**THE BOSTON CONSULTING GROUP** New York, NY  
**Summer Consultant** Summer 2000

- Assisted in developing a global E-commerce organization for a major client in financial services.
- Assessed financial performance and customer portfolio for a major client in IT services.
- Analyzed trends in wireless technologies and assessed implications for IT client's strategy.

**KLARABERG MANAGEMENT CONSULTANTS** Stockholm, Sweden  
**Project Manager and Senior Consultant** 1996-1999

- Klaraberg pioneered benchmarking methodology in Scandinavia. The firm has 20 consultants. Supervised client accounts for leading companies in telecommunications, facilities management and logistics.
- Managed global competitive benchmarking projects. Identified scenarios and competitive strategies for the next generation of integrated mobile tele- and data communications.
  - Developed a new market entry strategy for a \$1 billion installation services company.
  - Directed several market and competitive analysis projects in pharmaceuticals, telecommunications, distribution, logistics, travel and utilities for leading Swedish companies.
  - Developed and executed Klaraberg's marketing strategies and activities towards potential clients.
  - Responsible for the research and analysis team consisting of 5 junior consultants.

**LAGERKVIST & PARTNERS** Stockholm, Sweden  
**Consultant** 1995-1996

- Performed competitive and industry analysis for leading Scandinavian clients in financial services, airline, energy, insurance, real estate, building construction, retailing, electronics manufacturing and engineering.
- Prepared and presented sales pitches at CEO level.

**NOLIMITS FORUM OF BUSINESS IDEAS** Stockholm, Sweden  
**Founder and Chairman** 1998-Present

A network organization with 15 selected permanent members, with an objective to create innovative business ideas and concepts for entrepreneurial ventures.

**MILITARY ACADEMY**, Engineering Regiment Sodertälje, Sweden  
**Second Lieutenant** 1990-1991

Supervised 60 engineering soldiers in the construction and operation of military roads, bridges and drafts.

## ADDITIONAL INFORMATION

Enjoy traveling, politics, art, music, parachuting and athletics. International experiences from 40 countries.

## CHRISTOPHEAURAND

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### EDUCATION

**THE WHARTON SCHOOL, University of Pennsylvania**  
**Master of Business Administration Candidate**  
Major in Finance.  
Director's List Spring 2000 and First Year Honors.

**Philadelphia, PA, USA**  
Sep 1999 - May 2001

**ECOLE SUPERIEURE DE COMMERCE DE REIMS**  
Major in International Finance and Financial Markets.

**Reims, France**  
Sep 1990 - Jun 1993

### EXPERIENCE

**MERRILL LYNCH**  
**Summer Associate Equity Division**

**London, UK**  
Jun 2000 - Aug 2000

- Participated in a rotational program focusing on Equity Linked Products, from structuring and origination to sales and trading.
- Analyzed the European single stock warrants market and developed a trading application monitoring volatility levels.

**TAIYO LIFE GAMMA ASSET MANAGEMENT**  
*Ex Japan Gamma Asset Management, a joint venture between Taiyo Life, New York Life and Credit Commercial de France.*  
**Senior Fund Manager**

**Tokyo, Japan**  
Jul 1995 - Aug 1999

- Headed a team of four portfolio managers and two analysts, managing over \$4 billion in assets invested in Japanese and international equities and bonds, responsible for all investment operations under the supervision of the C.I.O..
- Managed over \$400 million in Japanese equities including French mutual funds, UK unit trusts and charities, and Japanese tokkin and pension funds.
- Outperformed the Japanese equity benchmark (Topix) by an average of 15% per annum over 4 years, implementing an active bottom-up investment strategy. Ranked first manager for Japanese equities three years in a row (out of fifteen competitors) for the management of the pension fund of a leading Japanese bank.
- Assisted the marketing team in presenting new products to clients, helping grow the assets under management from \$1 billion in 95 to over \$4 billion in 99.

**CREDIT COMMERCIAL DE FRANCE**  
**Options Trader**

**Tokyo, Japan**  
Sep 1993 - Jun 1995

- Managed an option book, trading volatility on JGB futures options and Euro - Yen futures options, with an annual target of \$1.5 million in profits.
- Developed and implemented arbitrage strategies together with the Arbitrage Team, involving cash bonds, swaps, cap & floors, swap options and options.

**CREDIT COMMERCIAL DE FRANCE**  
**Financial Controller**

**Paris, France**  
Apr 1992 - Dec 1992

- Controlled risks and results of Derivatives Products activities, including swaps, options and cap & floors.
- Involved in the Special Risks Team set up during the European currency crisis in 1992, measuring the overall exposure of the bank to short-term interest rates and reporting daily to the CEO.

### ADDITIONAL INFORMATION

- Languages: French (native), English (fluent), Japanese (conversational), Spanish (intermediate)
- Member of the following student organizations: Investment Management Club, Sales & Trading Club, Asian Club, European Club, Japanese Club, G.U.I.D.E. (mentoring program).
- Interests: ski, tennis, cinema and travel.

**JESSICA MARIE AVALLONE**  
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## EDUCATION

**THE WHARTON SCHOOL, University of Pennsylvania** Philadelphia, PA  
Master of Business Administration, Dual Major in Finance and Marketing May 2001  
Graduation with Honors (top 10% of class), Director's List, First Year Honors, GMAT 760

- *Professional Activities:* Admissions Volunteer, Women in Business Alumnae Liaison, Marketing Club VP
- *Teaching Assistant, Marketing 101:* Instructor of 4 undergraduate sections for case discussions and lectures  
*Management 653:* Field Application Project: Project management mentor and coach
- *Athletic Activities:* Women's Club Soccer, Flag Football, Intramural Basketball, Ballroom Dancing

**PRINCETON UNIVERSITY** Princeton, NJ  
Bachelor of Science in Electrical Engineering June 1997  
Expressions Dance Group, Habitat for Humanity Volunteer (resident power tools expert), Aerobics  
Instructor, Volunteer Girl Scout Leader, University Cottage Club, Alumni Schools Committee - Interviewer

## EXPERIENCE

**THE GILLETTE COMPANY** Boston, MA  
*Summer Associate* Summer 2001

### New Product Analysis

- Developed tool to facilitate selection of next-generation product.
  - Evaluated capex and unit contribution for all possible combinations of 12 technology options.
  - Compared revenue and expenditures to baseline (no new product) scenario.
  - Optimized capital equipment conversions vs. purchases according to use and capacity constraints.
  - Smoothed manufacturing volumes through use of pre-production and phased-in geographic launches.
  - Differentiated between expected sales volume of line extension launch vs. major new product launch.
  - Allowed lower equipment expenditures through variable machine utilization and conversion lead time.
- Performed sensitivity analysis to determine effect of changes to key assumptions.
- Summarized financial benefits of technology options to aid in strategic selection of next generation product.

**ANDERSEN CONSULTING** New York, NY  
*Consultant* 1997–1999, Summer 1996

Contributed to cases in the following industries: Consumer & Industrial Products, Retail, Internet, Insurance.

- Designed framework and independently analyzed productivity of weekly advertising circular to optimize quantity and placement of future flyer distributions.
- Developed metrics to gauge effectiveness of recommended strategy. Tested approach in 5 month, 20 store pilot test—collected sales by store and compared progress against plan and cost reduction target; projected annual benefits exceeded \$10M.
- Constructed and enhanced analytic model for calculating incremental sales and profit lift of items to be advertised. Results enabled client to maximize the effectiveness of each advertising exposure.
- Led client team in assessing and evaluating current software systems in order to find cross-divisional synergies; ensured on-time quality completion of surveys and interviews. Facilitated planning workshops.

### Business Analyst Intern Recruiting

- Created annual budget and plan for 1998 school year. Implemented plan and monitored performance vs. budget. Developed advertising and directed efforts of dozen-member team for candidate review.

**KRAFT FOODS** Tarrytown, NY  
*Associate Brand Manager—Maxwell House* Summer 2000

### Weekly and Monthly Business Tracking

- Proactively monitored business performance of 8 brands (\$700K revenue) due to advertising, consumer promotions, trade, competitive activity, and distribution. Recommended actions to maintain market share.
- Developed and revised sales forecasts on a weekly and monthly basis.

### Comprehensive Evaluation of Decaffeinated Business Opportunity

- Identified consumer drivers and analyzed current and historical decaf market: size, growth, distribution, pricing, regionality, channels, trade, CP, advertising, competitive landscape, attitudes, usage.
- Recommended specific strategies in synergy with 2001 plans; identified program costs and profit potential.

## SUSANNAHR.AXELROD

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### EDUCATION

#### THE WHARTON SCHOOL, University of Pennsylvania

Philadelphia, PA

*MBA Candidate : dual major in Marketing and Entrepreneurial Management*

May 2001

- Awarded 2<sup>nd</sup> Prize in the Dell/Microsoft/Amazon National Tech Case Competition and 1<sup>st</sup> Prize in the Clorox Marketing Match.
- Selected to work with MBA Career Management Services as a Graduate Assistant.
- Finalist in the Wharton Business Plan Competition.
- Elected International Representative in the Wharton Graduate Association and Director of the Student Public Interest Fund.
- Voted Co -President of *The Whartones* vocal group.

#### THE UNIVERSITY OF CHICAGO

Chicago, IL

*BA with honors, English Language and Literature*

June 1992

### EXPERIENCE

#### INTEL CORPORATION, Home Products Group (Internet Appliances and TV -related Solutions)

Santa Clara, CA

Intern, Strategic Marketing

Summer 2000

- Led planning sessions and created business plan documentation for start-up division within Intel.
- Worked with HPG top management to create an international strategy in the interactive TV industry.
- Analyzed financial models, competitive environment and industry structure in Internet and TV arenas.

#### HK CATALYST, High-tech venture capital and strategic advisory firm

Tel Aviv, Israel

Associate

1998 - 1999

- Evaluated business plans, positioning and management of prospective investments in Internet and next-generation communications.
- Headed strategy development and market assessment projects for clients in collision avoidance applications, manufacturing software and content security/encryption as senior member of an international team.
- Led business planning seminars with Internet and educational software start-ups.
- Identified targets in communications for **Siemens'** investing and business development divisions.

#### Senior Analyst

1997 - 1998

- Developed e-commerce application and consumer broadband strategies for HK Catalyst portfolio companies.
- Advised **Hitachi Microsystems** on investment and partnership opportunities in the Israeli semiconductor industry.
- Created positioning strategy for a start-up in Internet video technology. Presented conclusion to senior partners of Israel's second largest venture fund (DSPolaris).
- Supervised application design and strategy workshop on the corporate training market for client's senior management team.
- Directed marketing communications and PR campaign to build HK Catalyst's brand in Israel and abroad.

#### Analyst

1995 - 1997

- Worked closely with board member and long-term client John Sculley on a series of market analyses and strategy projects.
- Developed business plans and presentations for clients including Vocaltec (IP telephony), LivePicture (digital imaging), the Formula Group (diverse software subsidiary), the Clal Group (electronic components subsidiary) and Zapa (Internet graphics).

#### CIMATRON, NASDAQ -listed developer of CAD/CAM software

Tel Aviv, Israel

Marketing and Marcom Specialist

1995

- Managed creation and production of company brochures, newsletters, publications and multimedia.

#### MORNINGSTAR INC.

Chicago, IL

Marketing Coordinator

1993 - 1994

- Supervised three employees assisting with market research projects.
- Initiated and conducted an overhaul of direct mail procedures that saved the company over \$50K.

### ADDITIONAL INFORMATION

- Extensive travel and trekking in the Middle East, Europe and Asia (India, Indonesia and Thailand).
- Fluent in Hebrew; proficient in Spanish; dual citizen: USA and Israel.
- Founder and Chairperson, Young Professional Women's Network, professional networking group based in Israel.
- Israel Philharmonic Choir, soprano and soloist; advanced PADI diver.

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[Irem.Bacak.wg01@wharton.upenn.edu](mailto:Irem.Bacak.wg01@wharton.upenn.edu)

### EDUCATION

- THE WHARTON SCHOOL , University of Pennsylvania** Philadelphia, PA  
**MBA Candidate in Marketing and Strategic Management** May 2001
- Awarded the European Scholarship by Wharton European Alumni
  - Public Relations Officer, European Club
  - Member, Diversity Taskforce, Marketing Club, Wharton Community Consultants
- BOGAZICI UNIVERSITY** Istanbul, Turkey  
**BA in Management** 1992-1997
- Ranked 32nd in the university entrance exam among 1.3 million exam takers
  - Awarded scholarships from Istanbul Lisesi Education Fund and Ugur Dershanesi

### WORK EXPERIENCE

- CHASE GLOBAL PRIVATE BANK** New York, NY  
**Strategic Marketing - Summer Associate** 6/2000-09/2000
- Developed low-cost strategy for increasing Chase GPB client base, through creating tools and programs to mutually promote the business services of Chase and outside companies to their respective companies' client managers, and sharing client referrals.
  - Directed the Chase GPB website image design and production: chose image themes to complement site content, selected stock photographers, chose images, negotiated licensing fees and directed writing of licensing contracts.
  - Proposed and developed the Chase GPB campus recruitment strategy and tools, including the Chase GPB campus presentation.
  - Created the new GPB client presentation, to communicate the Bank's strategy and the new capabilities after recent acquisitions.
- YAPIKREDİ BANKASI** Istanbul, Turkey  
**Personal Banking Marketing - Product Director** 12/1998-08/1999
- Directed segmentation study of personal banking customers and presented to senior management.
  - Developed strategy and tailored products for each customer segment by analyzing the results of focus groups and in-depth interviews. Designed new focus group interviews to update data on the personal banking customers.
  - Evaluated strategic alternatives for new financial services including partnerships with auditing companies.
  - Coordinated the needs of marketing department in the process of selecting the data warehouse system, and campaign management modules to be used in the whole bank's information system.
  - Designed and managed promotional activities including direct mail and promotion to communicate the first personal banking service of Turkey to the customers and bank employees.
- MONITOR COMPANY** Istanbul, Turkey  
**Consultant** 10/1996-11/1998
- Analyzed quantitative data and surveys and conducted interviews with both senior and middle-level executives to facilitate strategy development for the clients in textile, human assets management and furniture industries.
  - Developed strategies for leading companies, owned by the largest holding of Turkey, which involved changing human resource systems and developing strategic alternatives for client's textile company.
  - Performed industry and company analysis to develop new clients in retail, home textile and media industries.
  - Directed PR activities of Istanbul Office including organizing events for clients with more than 200 guests.
  - Designed and set up the Research Department by coordinating with the other offices and national data providers.
- EUROSHOW-SHOW TV** Istanbul, Turkey  
**Program Planning Team - leader** (promoted to director level position from assistant) 05/1995-10/1996
- Created channel program schedule by analyzing audience preferences and rating reports.
  - Collaborated new program suggestions and program schedules with the marketing department by analyzing the advertising revenue performance, which resulted in 20% growth in advertising revenues.
  - Supervised the broadcasting control department, to ensure the correct implementation of program schedule.
  - Managed the relations with the European State Media Enterprises to receive permission to broadcast digitally in states of Europe and got the first and sole permission that is given to a Turkish private channel in Europe.

### ADDITIONAL INFORMATION

Languages: Turkish, English and German in business proficiency  
Activities: Turkish Bonemarrow Registry Foundation, Founding member. Leo Club -Ortakoy, President in 95/96.  
Interests: Psychology, ceramics, traveling, community service, poetry, dancing, swimming

**ASHESH BADANI**  
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[Ashesh\\_Badani@yahoo.com](mailto:Ashesh_Badani@yahoo.com)

## EXPERIENCE

### SUN MICROSYSTEMS

*Manager, Strategic Investments*

Palo Alto, CA  
August – October 2001

Part of team within the Corporate Strategy group responsible for venture investments and acquisitions

- Evaluated investments for the *SunONE* Business Unit (complementary to Forte tools, iPlanet products, J2EE-compliant web services) by undertaking gaps analysis and market research, coordinating with engineering and product marketing, initiating discussions with companies developing promising technologies, conducting due diligence and financial analysis.
- Supported the *Liberty Alliance Project* (coalition of 30 leading companies including Sony, United Airlines, Nokia) by investigating investment opportunities in single sign-on, federated identity, authentication and authorization.
- Authored strategy presentation on web services to evangelize it to senior management in various Business Units

### VOYAGER CAPITAL

*Associate*

Seattle, WA  
Summer 2000

Leading Pacific Northwest venture capital firm investing primarily in early stage companies; over \$260m under management.

- Managed investment process for \$9m lead investment in *Qsent*, a wireless content enabler: conducted financial, operational and legal due diligence; assisted in term sheet negotiations; coordinated deal with senior management and minority investors.
- Supported investment in *Checkspace*, a web-based payment startup: conducted competitive research and met with entrepreneurs.

### COMCAST INTERACTIVE CAPITAL

*Associate*

Philadelphia, PA  
Summer 2000

Corporate venture capital firm focused on Internet and enabling technologies; over \$250m committed capital from Comcast Corp.

- Enabled investment in *Expand Networks*, an enterprise caching company, by participating in management calls, analyzing market size and dynamics, creating a financial model, and leveraging Comcast resources for technology due diligence.
- Evaluated investment opportunity in a *VoIP enabling softswitch provider* by researching market and management interaction.

### MERRILL LYNCH

*Analyst, Telecommunications Investment Banking*

New York, Hong Kong & Singapore  
1996 – 1999

- Analyzed economics of undersea cable projects for capital raising (\$800m high-yield and \$400m IPO) and undisclosed advisory projects for *Global Crossing*. Conducted due diligence and performed valuation analysis of operations.
- Advised *Singapore Telecom* on wireless investment opportunities in Hong Kong. Conducted operational and network due diligence and led the valuation team. Recommended appropriate acquisition and bidding strategy to senior management.
- Involved in various advisory and financing projects for *Global TeleSystems* (due diligence in Belgium of pan-European fiber network, and of investments in Russia for IPO) and *Orbital Sciences* (national investor roadshow for equity offering).
- Ranked as top-tier performer in Analyst class.

## EDUCATION

### THE WHARTON SCHOOL, University of Pennsylvania

*Master of Business Administration (with Honors)*

Philadelphia, PA  
May 2001

*Major:* Finance and Strategic Management; *Concentration:* Information & eCommerce

- Recipient of *Dean's Award of Excellence*
- Chair, Wharton India Economic Forum 2000 – premier student-organized conference on India-related issues
- Director of Content (2001) and Broadband Panel Manager (2000) – Technology & Media Conference

### CORNELL UNIVERSITY, College of Arts and Sciences

*Bachelor of Arts in Economics (with Honors)*

Ithaca, NY  
May 1996

- Awarded full-tuition, merit-based scholarship; Dean's List
- Junior year at the **London School of Economics** focusing on International & Development Economics
- Honors thesis on the efficiency of auctions in allocating telecom licenses

*Interests include squash, soccer, travel, foreign films and Renaissance Art*

**RADHA M. BADANI**  
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### **EDUCATION**

**THE WHARTON SCHOOL, University of Pennsylvania** Philadelphia, PA  
*MBA Candidate in Entrepreneurial Management and Managing Electronic Commerce* May, 2001

- India Club – Chairperson of Social Activities; Wharton Follies – Writing Staff, Assistant Lighting Director
- Wharton India Economic Forum – Chairperson of Logistics
- E-Club – Co-Director of Alumni Outreach, 1999-2000
- Joint Winner in Dell Case Competition at Wharton – analyzed Amazon’s future business strategy

**THE WHARTON SCHOOL, University of Pennsylvania** Philadelphia, PA  
*BS in Economics, with concentration in Finance and Marketing* May, 1996

- Graduated Cum Laude; member of *Lantern*, Wharton’s senior honor society
- Organized and led 25 students through a business-study tour of India
- Teaching Assistant for Management 100, first-year course on leadership and teamwork

### **EXPERIENCE**

**AMAZON.COM, INC.** Seattle, WA  
*Product Management Intern, Toys* Summer, 2000

- Headed efforts to secure cooperative marketing agreements from top-10 vendors:  
Developed marketing calendar for each vendor; created presentation on the benefits of cooperative marketing; presented package to vendors. Received commitments from all top-10 vendors, including Hasbro, Fisher-Price and Mattel.
- Created program to measure and improve Amazon Toys *Delivers* (subscription-based monthly e-newsletters):  
Analyzed performance of past *Delivers* with respect to traffic, conversion and sales; implemented steps to facilitate ongoing *Delivers* tracking; provided recommendations to editorial team that will be implemented immediately.
- Initiated process for selling and tracking specialty vendor site placements and promotions:  
Prepared four tiers of marketing packages; worked with merchandising team to create attractive promotions; developed database to track sales. Process helped team exceed expectations in receiving cooperative marketing commitments.
- Managed the development of a special promotion used to introduce customers to a new product line:  
Oversaw relationships with sponsoring vendor, external agencies and internal cross-functional team. Promotion results surpassed team’s product awareness objectives by over 100%.
- Analyzed site traffic and conversion rates for Toys Group:  
Prepared conversion reports for 2<sup>nd</sup> quarter reviews; measured the success of specific on-line and off-line promotions.

**J.P. MORGAN & CO.** New York, NY  
*Analyst: Private Equity Placements & Telecommunications Investment Banking* 1996-1999

#### **Project Management and Marketing**

- Managed private equity fund raising process for a satellite services company:  
Led investors through due diligence; prepared market and financial analysis with senior management; negotiated with investors on behalf of client to determine appropriate valuation and terms. Resulted in raising \$50 million of equity.
- Executed marketing plan to raise venture capital for a wireless equipment company in the automatic meter reading sector:  
Drafted selling memorandum; identified over 75 potential investors; targeted marketing to these investors. Company successfully raised \$25 million in financing.
- Developed sales presentation and marketing strategy for a \$50 million basic-industries leveraged buyout fund:  
Coached management on ways to position and present plan in order to attract limited partners.

#### **Corporate Finance and Strategic Advisory**

- Performed merger valuation for proposed cross-border transaction in telecommunications sector:  
Produced breakup analysis of target company’s six major subsidiaries; evaluated various financial impacts on acquirer.
- Evaluated client’s potential investment in wireless company:  
Conducted sensitivity analyses on target’s business plan based on industry trends and benchmarks.
- Modeled financial business plan for a start-up venture in undersea fiber optic cable:  
Created demand-based and capacity-driven models; determined appropriate capital structure and financing options.

### **ADDITIONAL INFORMATION**

Fluent in Gujarati, working knowledge of Hindi  
Enjoy ethnic cooking, Indian folk dancing, and international travel

**TOMC.BAILEY**  
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## EDUCATION

**WHARTONSCHOOL,UniversityofPennsylvania** Philadelphia,PA  
*MBA,DoubleMajorinMarketing&Finance* 8/99 -5/01  
• PalmerScholar(Top5%ofClass );GraduationwithHonors

**STANFORDUNIVERSITY** Stanford,CA  
*MS,MechanicalEngineering* 9/95 -8/96  
• ConcentratedinProductDesignforManufacturability&ElectromechanicalSystemDesign  
• StanfordGraduateEngineeringFellowship(FullScholarship)

**PRINCETONUNIVERSITY** Princeton,NJ  
*BS,MechanicalEngineering* 9/90 -6/94  
• MagnaCumLaude;SigmaXi;TauBetaPi;NCAAAcademic“All -America”  
• TopStudent -AthleteintheSchoolofEngineeringAward  
• CaptainofMen’sVarsitySwimmingTeam;NCAAHonorableMentionSwimming“All -America”

## EXPERIENCE

**BOOZALLENHAMILTON,INC.** SanFrancisco,CA  
*SummerAssociate,Post -MergerIntegrationof2SoftwareCompanies* 6/00 -8/00  
• Validatedtheclient’smarketpositioningstrategybyconductinginterviewswithanalysts,customers, and otherstakeholdersandsynthesizingtheresultsforpresentationtotheclient’sseniormanagement  
• Preparedindustryvaluechainanalysiswhichinfluencedtherecommendedstrategicdirectionfortheclient  
• Formulatedkeystrategicobjectivesforeach corporatefunctionalareaoftheintegratedsoftwarecompany

**THEPROCTER&GAMBLECO.** Cincinnati,OH  
*FinancialAnalyst,GlobalProductSupplyGroup* 3/99 -6/99  
• Createdcompany -widemodeltoquantifythecostsavingspotentialofreducingsupplychaindemand variability;waslaterusedforbusinessstrategyrecommendationstoseniormanagement  
• Authoredinventorylearningmanualforseniormanagement,including7globalbusinessunitleaders  
• Developedcollaborativeprofit -improvementmodeltoassistsupplier sinreducingcostsviabenchmarking;was laterdevelopedintoacorecostingmodelusedbyP&GGlobalPurchases  
• Formulatedperformancemetricsforan“UltimateSupplySystem”pilotat6globallearningsites

*ProductionMaterialsEngineer,BabyCareProductsGroup* 9/96-2/99  
• ManagedqualificationofvendorsinGermany,Spain,andtheUSAtosupplyplantsinEuropeandNorth AmericawithrawmaterialsusedinthemanufactureofPampers™/Luvs™branddisposablelabelediapers  
• Responsibleforcoachsing suppliersina doptingP&G’s6 -Sigmamaterialqualitysystem  
• Managedmaterialsourcingprojectsresultingin>\$8MM/yr.costsavingsstoP&G

**NGEEANPOLYTECHNIC** RepublicofSingapore  
*Princeton-in-AsiaInternationalTeachingFellow* 6/94-6/95  
• Lecturedandledlaboratory exercisesforcoursesinappliedscience/engineeringwithstudentsaged16 -19  
• Headswimmingcoachtocoedteamof20student -athletes

## ADDITIONALINFORMATION

- Volunteer,UnitedWayallocationboardresponsiblefordistributing\$3.5MMtonon -profitagencies (1997-9)
- UndergraduateSummerInternships:FordMotorCo.(1992,1993);GeneralMotorsCorp.(1991)
- Languages:Spanishproficient
- Personallyfunded100%ofallegededucationalexpenses

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### EDUCATION

**THE WHARTON SCHOOL, UNIVERSITY OF PENNSYLVANIA** **Philadelphia, PA**  
**MBA Candidate (Finance and Technological Innovation)** Dec 20 00

- Leader, Platform Group, Wharton Technology Club.
- Member, Wharton Finance Club.
- Tiger Team member, Field Application Project: Worked with GE Small Business Solutions to effectively integrate the Internet with existing sales and support channels.

**THE UNIVERSITY OF MICHIGAN** **Ann Arbor, MI**  
**M.S. in Computer Science and Engineering** GPA 7.8/8.0 May 1996  
**Ph.D. Candidate** Aug. 1996

- Awarded a Fellowship and a Teaching Assistantship by the graduate school.
- Student member, Faculty Search Committee.

**THE UNIVERSITY OF ROORKEE** **Roorkee, India**  
**B.E. in Computer Science and Technology** GPA 4.0/4.0 May 1994

- Awarded a gold medal for achieving the first rank in the Computer Science department.
- Awarded cash prizes, tuition waiver and a scholarship for outstanding academic achievement.
- Best paper award at INFLUX 1993 (a technical symposium organized by the IEEE).

### EXPERIENCE

**SPEEDER NETWORKS INC.** **Santa Clara, CA & New Delhi, India**  
*Business Development Associate (Summer Intern)* Summer, 2000

- Worked with the CEO and CFO to prepare financial projections for potential investors.
- Worked with the VP of Sales to prepare and implement an entry strategy for Speeder's products in Asian markets.
- Prepared a market strategy for effectively positioning Speeder's product lines. As a part of this effort, I worked on estimating revenue from new products. This work was used as a quick basis for valuing the company.
- Led customer acquisition pitches and negotiated reseller agreements: I was involved in effectively targeting businesses and channel partners (in the United States and in India) for the sale of Speeder's Internet content delivery products.

**HEWLETT-PACKARD CORPORATION (HP)** **Cupertino, CA**  
*Software Design Engineer, Systems Interconnect Solutions Lab* 1996-1999

- Performed research and development of network protocols for clusters of HP computers. These protocols are used in computation-intensive research environments (aircraft design, crash simulation, database applications).
- Monitored usage and performance of HP products at international customer sites. This work established a clear process to incorporate customer feedback into the design of HP networking products.
- Initiated a summer internship program in the lab (1999). This effort required the management of a substantial budget and resulted in the successful completion of projects that sell as HP products today.
- Led a team of engineers in the disclosure of industry record SPECWEB and SAP -SD benchmarks.
- Implemented enhancements to the HP UNIX Operating System (HP -UX) for next generation network protocols.

**XEROX CORPORATION** **El Segundo, CA**  
*Software Engineer Intern* Summer, 1995

- Designed and implemented software to fetch documents from the WWW for the Xerox Odyssey printing system.
- Social Chair, Xerox Internship program.

### ADDITIONAL INFORMATION

- Enjoy reading, traveling, playing squash and listening to Indian classical music.
- Founding member, University of Roorkee, Batch of 1994 alumni trust. This trust provides funds to institute awards for excellence in teaching and research at the University of Roorkee, India.

**SURESH BALASUBRAMANIAN**  
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**Education**

<b>The Wharton School, University of Pennsylvania</b> <b>MBA Candidate, Majoring in Finance, Strategic Management</b> <ul style="list-style-type: none"><li>• Executive Vice President: Finance Club</li><li>• Member of: Tech Club, Media &amp; Entertainment Club</li><li>• Elected Social Representative for Cohort G</li></ul>	<b>Philadelphia, PA</b> <b>May 2001</b>
<b>The Ohio State University</b> <b>MS Computer Science</b>	<b>Columbus, OH</b> <b>1991</b>
<b>The Regional Engineering College</b> <b>BS Computer Science</b>	<b>Trichy, India</b> <b>1989</b>

**Experience**

<b>J.P. Morgan Inc.</b> <b>Summer Associate, Investment Banking – Technology Media Telecom Group</b> <i>Mergers &amp; Acquisitions</i>	<b>New York, NY</b> <b>6/00 – 8/00</b>
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- Participated in due diligence efforts for a \$1BN cross-border acquisition deal in the IT software sector - represented the buy side in the transaction. Helped prepare the fairness opinion for the client, modeled and analyzed accretion/dilution effects of the merger and other potential acquirers.
- Performed detailed analysis of the residential broadband and wireless markets in order to recommend a US distribution strategy for an international media giant (\$65BN) with assets in music, movies, video and games.

*Capital Structure Analysis*

- Helped a magazine publishing company (\$5BN) de-lever and balance its capital structure, in order to utilize cash flow generated for new media initiatives. Coordinated the teams efforts across different divisions: Equity Capital Markets, High Yield, M&A to present a cohesive strategic plan to the client

*Carve-outs and Divestitures*

- Advised an established venture capital, incubator firm on ways to increase shareholder value including exit strategies for its public portfolio. Performed detailed IRR analysis on each of the portfolio companies in order to determine suitable exit candidates and exit strategies

<b>Silicon Graphics Inc.</b> <b>Marketing Manager, Media &amp; Communications Industry Marketing</b>	<b>Mountain View, CA</b> <b>1997 - 1999</b>
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- Managed a virtual team across Europe, Asia and North America including sales managers, marketing associates and system engineers to generate annual revenues in excess of \$40M.
- Evaluated business plans for partner software companies, determined level of investment based on strategic importance, resulting in additional leveraged hardware sales valued at several million dollars.
- Developed and delivered company's overall market strategy for the Animation & Special effects industry; was identified as the industry specialist within the organization
- Advocated the adoption of digital technology in the traditional animation business environment (the current standard) through direct interaction with press and key industry players.
- Negotiated critical sales situations, achieved 95% success rates in closing deals. Total value of deals closed over 2 years: \$10M.
- Maintained business relationships with premier customers, devised PR and marketing campaigns to promote their recent successes in trade press and at industry trade shows and conferences.

<b>Member of Technical Staff, Workstations Product Division</b>	<b>1994 - 1997</b>
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- Built the core graphics capabilities for one of the most successful workstation products. Revenues crossed \$1 billion in less than 18 months.
- Promoted to Marketing Manager responsible for managing worldwide revenues from the Animation and Special Effects industry.

<b>Digital Equipment Corp.</b> <b>Principal Software Engineer. Workstations Systems Engineering</b>	<b>Palo Alto, CA</b> <b>1991 - 1994</b>
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- Architected 3D graphics software for the workstation product line, generating over \$500M in revenues over a period of 3 years.

**Activities/Hobbies**

Tennis (USTA League), Skiing, Hiking  
GUIDE Mentorship Program, Manage own Portfolio, Wharton Clubs: Tech, Cigar

**Laurie A. Bales**  
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## EDUCATION

**THE WHARTON SCHOOL, University of Pennsylvania** Philadelphia, PA  
*Master of Business Administration Candidate* May 2001  
Dual Major in Finance and Entrepreneurial Management

- First Year Honors List
- Finance Club member, Christmas in April house manager, Graduation Committee co-chair
- Global Immersion Program participant –European Union

**THE WHARTON SCHOOL, University of Pennsylvania** Philadelphia, PA  
*Bachelor of Science in Economics, summa cum laude* May 1994  
Concentration in Accounting  
Honors: Dean's List for four years, Beta Gamma Sigma, outstanding graduate in accounting award

## EXPERIENCE

**FIRST UNION SECURITIES, INC.** Charlotte, NC  
*Summer Associate, Mergers and Acquisitions* (formerly Bowles Hollowell Conner) Summer 2000

- Evaluated strategic alternatives for the world's leading branded lawn and garden company; researched industry and peer groups, identifying drivers of value; analyzed potential acquisitions, sale of the business or divestiture of select segments, and a possible leveraged buyout by a major shareholder.
- Participated in due diligence and co-authored Confidential Information Memorandum for a healthcare provider.
- Prepared valuation and pro forma merger analyses for two targets in the medical device industry.
- Researched industry trends, competitors and private equity market for a pitch to raise \$100 million of new equity for a major building products distributor.
- Gained extensive experience modeling various financing alternatives and valuations using discounted cash flow, leveraged buyout, comparable company, precedent transaction, and accretion/dilution methodologies.

**APEX HEALTH, INC.** Boston, MA  
A start-up healthcare services company focused on women's health  
*Director of Development* 1998 –1999

- Evaluated acquisition opportunities through in-depth financial analyses and operational due diligence reviews.
- Negotiated transactions doubling the number of affiliated physicians to 360.
- Researched new product lines to expand services offered to affiliated physicians and negotiated exclusive provider arrangements with strategic partners.

*Manager of Corporate Analysis* 1998

- Developed corporate financial model and analyzed optimal capital structure for private equity financing.
- Drafted comprehensive business plans for new affiliations.

**PRICEWATERHOUSECOOPERS LLP** Houston, TX  
*Senior, Audit and Business Advisory Services* 1994 –1998

- Leads senior on publicly-traded, venture capital backed and privately-held engagements; responsible for project administration as well as planning and supervising multiple concurrent audit, due diligence and consulting engagements.
- Participated in fifteen acquisition engagements and prepared related pro forma financial statements, private placement memoranda and due diligence reports.
- Created the valuation model for a \$400 million proposed acquisition and evaluated post-merger consequences.
- Developed the financial and operational reporting requirements for a client and trained its employees.
- Gained significant SEC reporting experience from public company audits and acquisition engagements.
- Presented proposals and project findings to clients' senior management.

## ADDITIONAL INFORMATION

- Certified Public Accountant (CPA), State of Texas
- Junior Achievement instructor (1995 –1998)

**JUSTIN D. BARNEY**  
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## EDUCATION

**THE WHARTON SCHOOL, UNIVERSITY OF PENNSYLVANIA** Philadelphia, PA  
MBA Candidate – Dual Major in Technological Innovation and Entrepreneurial Management May 2001

- Member of Technology, Entrepreneurship, E-Commerce and Private Equity Clubs
- Significant Charitable Activities: Christmas in April (Project Leader); Say Yes to Education; MS Bike-A-Thon
- Co-Captain: Wharton Wildmen Ice Hockey Club – D Team

**UNIVERSITY OF COLORADO** Boulder, CO  
Bachelor of Science in Business – Dual Major in Finance and International Business May 1995

## EXPERIENCE

**NARUS INC.** Palo Alto, CA  
**Intern – Solutions Marketing** Summer 2000

*NARUS, a pre-IPO technology company, provides IP Service Providers with complete information about customer activities on their network, and enables the creation of differentiated service offerings based on that intelligence with real-time, usage-based billing capabilities.*

- Initiated, and was project leader for, a joint solution between Cisco, Portal Software and NARUS targeted at broadband cable service providers. The Cisco/Portal/NARUS offering represents an integrated end-to-end equipment and software solution for broadband cable operators who wish to implement usage-based billing plans over their networks. Key deliverables included a joint white paper and case study with ROI analysis.
- Responsible for identifying and defining the NARUS specific solution for the ASP and Hosting Services (data centers) industry segments. Made a presentation to the worldwide NARUS sales force to deliver the following collateral for the Hosting Services segment: industry overview, target customer list, white paper, case study and sales presentation for the sales force to utilize in the field.

**CHASE CAPITAL PARTNERS (CCP)** New York, NY  
**Associate** 1997 - 1999

*Chase Capital Partners is a global private equity/venture capital organization with over \$12.0 billion under management.*

- Conducted extensive due diligence and performed comprehensive private equity investment and valuation analysis including the evaluation of business plans, operating/acquisition strategies, competition, industry trends and economic factors.
- Completed twelve private equity transactions including leveraged buyouts, venture capital and mezzanine transactions with total equity capital invested/committed of \$327 million. Played a key role in formulating, executing and closing transactions. Coordinated various transaction consultants. Assisted in negotiating investment documents. Supported portfolio companies post closing with add-on acquisition and financing decisions.
- Promoted from Analyst to Associate after receiving highest performance rating for first year review.

**CHASE SECURITIES INC.** New York, NY  
**Financial Analyst; High Yield Corporate Finance; Global Investment Banking** 1995 - 1997

*Underwriter of high-yield corporate debt, specializing in the “one stop shopping” financing of leveraged buy-outs.*

- Completed nine lead managed and seven co-managed transactions for domestic and international companies in various industries, with total proceeds of \$2.4 billion.
- Primary responsibilities included i) conducting due diligence; ii) financial modeling; iii) negotiating bond terms and covenants; iv) drafting offering documentation; v) preparing marketing presentations; vi) assisting in the pricing and distribution of high yield transactions; and vii) new Analyst mentoring.
- Received the highest performance rating both years as an Analyst.

## MILITARY EXPERIENCE

**UNITED STATES MARINE CORPS RESERVES** Aurora, CO  
**Corporal, Marine Air Control Squadron 24, Administrative Clerk** 1992 - 1995

- Completed eight months of active duty including boot camp, Marine Combat Training school and Administration school. Graduated boot camp and Administration school as squad leader. Meritoriously promoted to Corporal (non-commissioned officer status) nine months after reporting to reserve unit, over a year ahead of peer group.

**CHRISTOPHER J. BARRY**  
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## EDUCATION

**THE WHARTON SCHOOL, UNIVERSITY OF PENNSYLVANIA** Philadelphia, PA  
**Master of Business Administration Candidate, Strategic Management and Finance** May 2001

- Admissions Graduate Assistant, Out for Business V.P. of Professional Development
- Christmas in April housing team leader, Cohort quality circle representative
- Selected to Tiger Team that developed an interactive marketing strategy for Campbell Soup

**LONDON SCHOOL OF ECONOMICS AND POLITICAL SCIENCE** United Kingdom  
**Master of Science (Economics) in International Relations** July 1995

- Concentration and dissertation: Western European economic, political, and monetary integration
- Fulbright Graduate Student Scholar to the United Kingdom

**TUFTS UNIVERSITY** Somerville, MA  
**Bachelor of Arts in Economics and International Relations** May 1994

- Summa cum laude and Phi Beta Kappa ; GPA 3.87/4.00
- Four senior prizes scholarships: economics, history, intellectual curiosity, outstanding initiative
- Research Assistant to Professor Drusilla Brown, Fletcher School of Law and Diplomacy

## EXPERIENCE

**BAIN & COMPANY** Boston, MA  
**Summer Associate** Summer 2000

*Designed a target market strategy for a pre-IPO web development company.*

- Conducted market sizing and competitive analysis. Identified an under-penetrated universe of 6,000 mid-sized companies with web spending between \$1mm and \$6mm. Recommended three key target industries.

*Performed due diligence on a proposed industry-sponsored B2B exchange.*

- Assessed the capabilities of 10 B2B exchange enablers across the critical value chain and recommended a preferred technology partner.

**FIDELITY MANAGEMENT AND RESEARCH COMPANY** Boston, MA  
**High Yield and Fixed Income Divisions: Research Associate/Analyst** 1995 – 1999

*Leadership and Engagement Management*

- Developed, presented, and published buy and sell recommendations that drove the investment allocations of portfolio managers' high yield and fixed income funds.
- Co-led general obligation bond research; identified investment opportunities, supervised an \$800mm credit portfolio.
- Directed numerous in-house meetings, site visits, and conference calls with senior management of potential investment companies to assess business and operating strategies and competitive positioning.

*Quantitative Analysis and Research*

- Led the research effort on over 105 small capitalization companies in a wider range of industries including retail, food and beverage, containers, printing and publishing, and technology.
- Analyzed and assessed industry and product outlook, quality of company management, financial performance, and firm capital structure in formulating investment recommendations.
- Evaluated over 150 different municipal bond credits and municipal bond insurance companies.
- Conducted extensive financial modeling, forecasting, and scenario analysis.

*Internal Development*

- Developed quantitative analytical tools and trained portfolio managers, analysts, and associates on their use.
- Initiated the redesign of the Research Associate position; recruited and trained 16 new associates.

## ADDITIONAL INFORMATION

- Proficient in conversational and written Spanish.
- Financed 100% of secondary, undergraduate, and graduate education through work, scholarships, and loans.
- Interests include reading, mountain biking, independent film, travel, music, dogs.

**SVETLANABASOVSKY**  
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**EDUCATION**

**THE WHARTON SCHOOL, University of Pennsylvania** Philadelphia, PA  
**MBA Candidate**; Majors in Entrepreneurial Management and Finance 2001  
• Clubs: Consulting (VP, Events), E-Commerce, Entrepreneurship.  
• Global Consulting Practicum: Developed U.S. market entry strategy for an African coffee producer.

**UNIVERSITY OF ROCHESTER** Rochester, NY  
**M.S. Public Policy Analysis** 1993  
**B.A. Economics, Political Science** with honors 1992  
• Awards: Phi Beta Kappa; Magna Cum Laude; Economics Honor Society.  
• U.S. House of Representatives, Legislative Intern (1991): Assisted Congressman with developing trade policy.  
• President, Shotokan Karate Club.

**PROFESSIONAL EXPERIENCE**

**The Boston Consulting Group: Summer Consultant** New York, NY  
*Worked with team to develop growth strategy for major media company.* Summer 2000  
• Co-facilitated client team activities, identifying and prioritizing opportunities in traditional and new media/commerce.  
• Developed implementation plans for selected initiatives, working closely with client team members.  
• Conducted competitor analysis and benchmarking of client's performance against industry.

**Young & Rubicam, Inc.: Vice President** New York, NY  
*Strategy Development and Analysis* 1996-1999  
• Designed new product entry strategy for a \$150B automobile manufacturer. The team effort resulted in the successful launch of a luxury vehicle in the European market.  
• Built an econometric model for a major retailer to predict price elasticity based on brand strength. Model assisted with purchasing strategy, selection of highly profitable consumer segments, and promotional tactics.  
• Evaluated industry trends and consumer perceptions of a housewares firm for potential buyer. Found that price premium and market share were not sustainable, contributing to a significant reduction in company's acquisition price.

*Leadership and Teamwork*

- Led research project to develop Y&R's understanding of globalization and growth of shareholder value through brand. Findings enhanced the corporation's thought leadership in the industry and deepened client relationships.
- Designed and conducted training sessions on strategy and research methods to colleagues worldwide.

*Client Development*

- Collaborated with New Business Team on analyses of consumer segments, potential markets, and competitive brand position.
- Co-authored presentation that grew revenues from key clients.
- Developed and presented strategic recommendations and research findings to senior client management.

**Harvard Institute for International Development: Manager** Moscow, Russia  
1995  
• Collaborated with a team of leading economists to influence Russian macroeconomic policy through published analyses of financial stabilization and regional economic performance.  
• Managed the start-up of a research institute; supervised and trained support staff; secured funding.  
• Initiated and instituted methods for communication and collaboration among international research team members.

**Abt Associates (Policy Consulting): Summer Consultant** Washington, DC  
1992  
• Worked with a team of economists to develop policy recommendations based on econometric models.

**RESEARCH FELLOWSHIPS**

**Fulbright Foundation: Research Scholar.** Tel Aviv, Israel  
1994  
• Conducted in-depth interviews with academics, businessmen, and political activists to evaluate immigration policy.  
• Developed original theory of separation from the political establishment based on a case study of Soviet immigrants.

**Ford Foundation: Research Fellow.** Lagos, Nigeria  
1991  
• Analyzed leadership characteristics among Nigerian women through interviews with political and business leaders.

**ADDITIONAL INFORMATION**

**Languages:** Native Russian; Proficient in Ukrainian and French; Training in Hebrew and Spanish.

**Publications:** "Hidden Employment: A Social Analysis". *A Survey of Russia's Social Policy*. 1995.

**Interests Include:** Filmmaking, Backpacking, 20th C. Literature, Piano, International Cuisine, Salsa Dancing.

**MARK HOPKINS BATES**

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**Education**

**The Wharton School, University of Pennsylvania** Philadelphia, PA  
**Master of Business Administration Candidate**, Finance Major, Private Equity May 2001

**Skidmore College** Saratoga Springs, NY  
**Bachelor of Arts**, Philosophy and Political Science Double Major May 1994

- Co-Founder and Captain, Men's Swim Team and Captain Men's Crew
- GMAT 700

**Venture Capital Experience**

**Center for Technology Transfer**, University of Pennsylvania Philadelphia, PA  
**Assistant to the Director**, Staff of 30 April 2000 – Present

- Advising and assisting faculty and staff in commercializing University funded R&D, personnel, technology and intellectual property.

**Plum Capital, LLC** Philadelphia, PA  
**Summer Intern**, Newly Started Venture Capital Firm Summer 2000

- Produced offering memorandum and interactive slideshow for Plum's upcoming \$100MM fund.
- Developed relational database system for tracking and analyzing all deals and performance of all portfolio companies. Designed operations standards for the system and trained Plum staff and advisors in the system's use.
- Screened and developed analyst's report on 2-3 new prospective deals per week.

**Management Experience**

**Lippert/Heilshorn & Associates, Inc.** New York, NY  
**Senior Account Executive**, Investor Relations Consulting Firm 1998-1999  
Revised, re-staffed and ran financial media relations department servicing small -cap companies in the healthcare, high-tech, and consumer products industries.

- Increased financial media clients from 6 to 28 in less than six months.
- Increased total company client list by 10% as member of new business development team.

**Dyer Associates** Winthrop, ME  
**Junior Partner**, Start-up Public Relations and Communications Consulting Company 1995-1998  
Shaped and designed all aspects of business with company founder.

- Designed and implemented full scale public relations programs and crisis communications plans for companies such as Waste Management, Inc., International Paper, Inc., and the Maine Hospital Association.
- Acquired approximately 30% of all new business and fostered personal client roster.

**Sutton Resources** Aishalton, Guyana  
**Advisor to the Chairman**, Multinational Mining Corporation 1994  
Investigated and made recommendations for abating the negative impact of introducing a mining operation in an Amazonian rainforest village economy.

**ORENBE'ERI**  
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## EDUCATION

**THE WHARTON SCHOOL, University of Pennsylvania** Philadelphia, US  
**Master of Business Administration Candidate**, Major in Finance May 2001

- Corporate Finance Teaching Assistant
- Granted Shils/Zeidman Fellowship for excellence in business
- Member of Finance and Technology clubs; Christmas -in-April House Manager

**TEL AVIV UNIVERSITY** Tel Aviv, Israel  
**Bachelor of Arts in Economics**, Magna Cum Laude, Dean's Lists for two years 1994-1996

- Awarded two academic merit scholarships and selected for accelerated M.A. in Economics
- Self-financed entire education by working full-time; Graduated one year in advance
- Senior thesis served as basis of a bill proposed in the Knesset, Israel's Parliament

## EXPERIENCE

**MORGAN STANLEY DEAN WITTER** London, UK  
**Summer Associate, Investment Banking Division - Mergers and Acquisitions** Summer 2000

- Prepared break-up valuation, comparable analyses and presentation to a client's executive team on the acquisition of a \$3 billion telecommunication equipment company
- Evaluated impact of acquisition scenarios and drafted fee and bid letters for a \$400 million self-stake acquisition in a \$2 billion British satellite service provider
- Performed LBO valuation for the aforementioned transaction
- Researched and analyzed the European electronics manufacturing services market and recommended potential M&A targets to the Technology Coverage Group

**THE GOVERNMENT OF ISRAEL, MINISTRY OF DEFENSE** New York, US  
**Unit Manager, IT Procurement Department, Intelligence Corps** 1997-1999

- Utilized a \$65 million budget to procure IT and telecommunication equipment in the US
- Coordinated and negotiated technology equipment acquisitions with senior management at IBM, Hewlett-Packard, Cisco, Compaq, Silicon Graphics and TRW
  - Obtained a \$14 million savings for the Israeli Intelligence Corps

**HACAREM COMPANY LTD**, largest importer of alcoholic beverages in Israel Tel Aviv, Israel  
**Marketing Manager** 1993-1997

- Supervised the marketing operations of Absolut Vodka, Campari and Glenfiddich in Israel
- Managed five marketing associates and a \$500,000 annual marketing budget
  - Changed product and marketing mix, resulting in 30% increase in revenues in two years

**ELITE COMMANDO FORCES**, Israeli Defense Forces Israel  
**Captain, Company Commander** 1988-1992

- Led Company of 81 officers and enlisted men in operational duty in Lebanon
- Planned and executed complex missions, involving hundreds of soldiers and combat under fire
  - Assumed responsibility for the morale, training, discipline and safety of commandos
  - Graduated with Highest Honors from Officers' Academy - Top 8 cadets out of 240 - officer class
  - Ranked 1<sup>st</sup> in 1991 IDF Reconnaissance Officers Course
  - Handpicked for "The Unit", Israel's anti-terrorism and intelligence-gathering special forces unit and the most selective unit in Israel with less than 0.5% acceptance rate

## ADDITIONAL INFORMATION

- Co-founded an not-for-profit organization reported on The New York Times, The Washington Post and CNN
- Selected to The Young Leaders Network of the Shimon Peres Center for Peace
- Recommended to Wharton by Israeli Prime Minister Ehud Barak
- Interests: Community service, politics, biographies, mountaineering and off-pisteskiing

**MARK J. BEARDI**  
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## EDUCATION

**THE WHARTON SCHOOL**, University of Pennsylvania Philadelphia, PA  
*Master of Business Administration, Finance Major* May 2001

- Member of the Finance Club
- Cohort social representative

**CORNELL UNIVERSITY** Ithaca, NY  
*Bachelor of Science in Applied Economics and Business Management* May 1994

- Dean's List, Golden Key National Honor Society, Gamma Sigma Delta Honor Society
- Officer of Cornell Entrepreneurs
- Recipient of Entrepreneurship and Personal Enterprise Business Counseling Award

## EMPLOYMENT EXPERIENCE

**MERRILL LYNCH & CO.** New York, NY  
*Associate, Investment Banking Division - Financial Institutions Group* Summer 2000 & Fall 2001

- Completed associate training program
- Participated in a sell-side M&A assignment for a large commercial bank - drafted descriptive memorandums for both the bank and its commercial finance subsidiary
- Participated in a buy-side M&A assignment for a major insurance company - prepared financial model to assess accretive/dilutive impact of proposed transaction and advised client regarding valuation throughout the bidding process
- Coordinated presentation that was used by the head of the Financial Institutions Group at an offsite conference for leading domestic asset management clients

**MORGAN STANLEY DEAN WITTER** New York, NY  
*Associate, Investment Management* August 1997 - June 1999

- Analyzed the performance of emerging markets equity funds to enable portfolio managers to interpret the impact of prior decisions and to shape ongoing portfolio strategy; quantified the contribution to total portfolio return from stock selection, country allocation, and currency hedging activities
- Created and implemented a series of regional performance spreadsheets that were used by the head of the emerging market equity product to evaluate the effectiveness of the global investment team
- Selected by senior management to serve on European Economic and Monetary Union (EMU) task force
- Identified operations and trading systems that would be affected by the European currency unification and developed the test plan which ensured EMU compliance and minimized business risk
- Developed marketing materials which emphasized the superior risk/return relationship of the firm's funds compared to that of four competitors; worked with the sales team to implement this analysis as part of their overall marketing approach

**BLACKROCK FINANCIAL MANAGEMENT** New York, NY  
*Analyst* September 1994 - August 1997

- Established a portfolio tracking system for institutional accounts which monitored adherence to client investment guidelines; provided important feedback to portfolio managers to ensure prompt resolution of open compliance issues
- Led firmwide effort to construct performance composites in compliance with Association of Investment Management and Research (AIMR) standards and represented the firm during a critical audit of these composites
- Recruited, trained and supervised outside vendors to perform monthly total return calculations (this outsourcing effort ultimately reduced the number of in-house calculations by 75%)
- Calculated monthly total returns for institutional portfolios and mutual funds using both time and dollar weighted return methodologies

## ADDITIONAL INFORMATION

- Licensed Series 7 and Series 63 representative
- Interests: Pro Football (Avid Buffalo Bills fan), Tennis, Reading, Live Music

**GREGORY L. BELEW**  
1530 Locust St. #6 Philadelphia, PA 19102  
(215) 731-1588  
Gregory.Belew.wg01@wharton.upenn.edu

### EDUCATION

**THE WHARTON SCHOOL, University of Pennsylvania** Philadelphia, PA  
Master of Business Administration Candidate, Finance and Entrepreneurship Major May, 2001

- Involved in Entrepreneur, E-commerce, and Real Estate Clubs, GUIDE Mentoring Program
- House Manager for Christmas in April Program, Co-President of Real Estate Club

**SOUTHERN METHODIST UNIVERSITY** Dallas, TX  
Bachelor of Business Administration, Finance and Real Estate Major 1993

- President of Delta Sigma Pi Business Fraternity, 1993

### EXPERIENCE

**DONALDSON, LUFKIN & JENRETTE** New York, NY  
**Summer Associate, DLJ Asset Management** Summer 2000

- Responsible for due diligence on investments in private equity and venture capital funds with diverse focuses.
- Reviewed performance and investment strategies of domestic and international private equity firms, interviewed sixteen fund managers, authored reports for use by DLJ investment committee.
- Produced comprehensive private equity research report exploring industry trends and typical fund operations.

**JPI DEVELOPMENT (National Multifamily Development Firm)** San Francisco, CA  
**Development Associate** 1997-1999

- Involved in all aspects of property development and acquisitions for a major national apartment development firm.
- Performed project feasibility analysis, financial modeling, lender presentations, contract negotiation and review, architectural design review, and city code review.
- Guided \$30-\$120 million projects through due diligence, design, financing, governmental approval, construction, marketing, and property management phases.
- Orchestrated real estate brokers, attorneys, architects, engineers, miscellaneous consultants, and construction manager to successfully develop and acquire luxury apartment properties.

**JPI DEVELOPMENT** San Diego, CA  
**Regional Director of Market Research** 1996-1997

- Co-founder of West Coast office for firm. Managed department with staff of two analysts and three assistants.
- Produced quantitative and qualitative project feasibility studies based on competitive assessment, demographic and economic research, supply and demand modeling, and historical market review for over \$240 million of property.
- Presented research and proposal to principals of firm, lenders, equity partners, and potential property buyers.

**JPI DEVELOPMENT** Dallas, TX  
**Market Research Analyst** 1995-1996

- Performed economic, demographic, and competition analysis, and authored quarterly market fundamental reports.
- Traveled nationwide to assess raw land and parcels and developed property acquisitions.

**ANDERSEN CONSULTING** Dallas, TX  
**Staff Consultant** 1994-1995

- Team member on information systems and management consulting engagements focusing on financial systems re-engineering, bank merger integration strategy, and system programming and repair.
- Client projects included: *LSG Skychefs*, Arlington, Texas, *Delta Airlines*, Atlanta, Georgia, *Florida Power and Light*, Miami, Florida, *Bank One*, Dallas, Texas.

**G.E. CAPITAL REALTY GROUP** Dallas, TX  
**Financial Analyst**, Temporary position before start date with Andersen Consulting 1994

- Performed cash flow projections and valuations on commercial portfolios for Asset Management Department.

### ADDITIONAL INFORMATION

- Publications: *Rental Owner*, February 1997: "The Changing San Diego Market Place", *Rental Owner*, February 1998: "San Diego's New Market"
- Interests: travel, cooking, softball, hiking, community service

## SAMBELL

Samuel.Bell.WG00@Wharton.UPenn.edu  
(415)902 -6658

## EDUCATION

**The Wharton School**, University of Pennsylvania May 2001  
**MBA, Individualized major focused on Marketing** Philadelphia, PA

Began in 1998, delayed 2<sup>nd</sup> year until Fall 2000 to continue with **Double Twist**.

- Valued \$1b+ market -sized lead candidate using binomial option pricing for **Neose Technologies** <www.neose.com>, a public biotech company.
- Researched \$7b brand extension and quantified market for **Della & James** <www.dellajames.com>, a Kleiner Perkins-backed wedding gifts registry.

**Duke University** June 1993  
**BA, Economics** Durham, NC

- Analyzed macro -economic trends for **Professor Jeffrey Sachs, Harvard University**, as part of his advice to Poland's Minister of Finance on stabilization and privatization programs after the fall of the Berlin Wall. Consulted for a turnaround firm in Poland, backed by the United Nations Development Programme and the German Marshall Fund. Developed distribution network enabling hand-tool manufacturer to export to the United States.
- Co-founded the **Duke University Community Service Center**, the campus volunteer center.

## WORK EXPERIENCE

**Double Twist** <www.doubletwist.com> Summer 1999 to Fall 2000  
**Director, Marketing and Finance** San Francisco, CA

Assisted in the turnaround of a nearly stage enterprise software company for the data warehousing and mining of genomic information. Backers include Kleiner Perkins and other prominent venture funds.

- MARKETING** – Managed a cross -functional team of 20+ employees in development through Beta of our direct -to-consumer Internet product, Double Twist.com™. Planned the sales rollout -out of our database product, Prophecy™, marketed to the enterprise, achieving \$2m in first month sales. Performed initial market research.
- BUSINESS DEVELOPMENT** – Initiated strategic alliances and business development partnerships. Prepared due diligence and assisted in the negotiations of multiple partnering deals.
- FINANCING** – Worked with the CFO to raise \$37m in equity financing with a \$100m book. Oversaw road show and due diligence. Built company -wide financial plan for investor groups and internal management. Assisted in the IPO process through filing, including coordinating the S1 and preparing due diligence. Built initial relationships with the research analysts.

**Independent project advisory work to early -stage ventures** Fall 1996 to present  
Personally recruited all clients. Projects include: Durham, NC, and San Francisco, CA

- ENTERPRISE SOFTWARE** – Currently, advising a start -up selling software that provides differentiated capabilities for the data bus by extending it to the communications services.
- BIOTECHNOLOGY** – Prepared the demand forecast and business case for **Genomic Health** <www.genomichealth.com>, a biotechnology company recently funded by Kleiner, Perkins. Wrote business plan for **Alphavax** <www.alphavax.com>, a start -up focused on a vaccine delivery system. Assisted in the licensing of intellectual property from the University of North Carolina, Chapel Hill.
- WIRELESS** – Assisted development of the business plan and marketing strategy for **Neomar** <www.neomar.com>, a multi -platform WAP browser and secure gateway. Company subsequently partnered with Research In Motion (RIM).

**Deloitte Consulting**, Spring 1994 to Spring 1996  
**Business Analyst** Boston, MA

Consulted on reengineering and strategy advisory work in the healthcare, energy and steel industries.

## OUTSIDE INTERESTS

**VOLUNTEER SERVICE** – Established **Street Project Boston**. Elected to their Board of Directors.

**TRAVEL** – Fly -fished the Rocky Mountains and explored Texas and the South (1993 -1994). Lived in Warsaw, Poland. Toured India, China and, more recently, Guatemala, Brazil, and Argentina.

**OTHER** – Avid cook. Hiking. Fishing. Camping. Learning to surf. Documentary photography.

## PHILIP J. BELLARIA

2323 Locust Street  
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### EDUCATION

**THE WHARTON SCHOOL**, University of Pennsylvania Philadelphia, PA  
**Master of Business Administration Candidate in Finance** (GMAT –760) *Director's List* May 2001

- Developed e-commerce strategies for Godiva Chocolatier as member of elite student consulting project
- Selected to compete against other MBA students at *The Economist* Business Case Challenge in Montreal, Quebec

**THE SCHOOL OF ADVANCED INTERNATIONAL STUDIES**, Johns Hopkins University Washington, DC  
**Master of Arts Candidate in International Economics and Latin American Studies** May 2001

- 4.0 GPA; Michael R. Bloomberg Fellowship (outstanding academic and professional achievement)
- Led executive administration as President of the United States during 1999 SAIS Crisis Simulation

**DUKE UNIVERSITY** Durham, NC / Florence, Italy  
**Bachelor of Arts in Economics** May 1992

- 3.84 GPA, Magna Cum Laude, Phi Beta Kappa, Dean's List with Distinction
- Earned 4-year full tuition scholarship, Leadership Award; elected chapter President, Kappa Sigma Fraternity

### EXPERIENCE

**MCKINSEY & COMPANY, INC.** Washington, DC  
**Summer Associate** Summer 2000

- Analyzed and targeted new revenue opportunities, mapped competitive landscape, and identified strategic partnerships to build new businesses and develop complete offerings for wireless applications service provider.
- Within wireless machine-to-machine communications, developed business plan to establish marquee customer account, build core platform for enterprise-wide applications, and capture potential \$120M recurring revenue market.

**SUPERINTENDENCY OF BANKING AND INSURANCE (SBS)** Lima, Peru  
**Research Associate** Summer 1999

- Authored 3 paper on market risk models and regulatory schemes to Peruvian banking and insurance regulatory agency. Analysis helped to reform Insurance Guarantee Fund to reflect more closely each company's portfolio risk.
- Developed model to measure Value at Risk of investments in the illiquid Peruvian corporate bond market, enabling the SBS to accurately monitor unique and systemic risk in investment portfolios of financial institutions.

**APPLIED MATERIALS, INC.** Santa Clara, CA  
**Marketing Project Manager, Taiwan Product Delivery Team** 1997-1998

- Formulated and implemented Taiwan account strategies, achieving 100% market share in 4 customer locations; promoted to Account Lead within 6 months.
- Determined production timetable, conducted gross margin analyses, and ensured on-time delivery of semiconductor equipment worth over \$120 million.

**UNITED STATES AIR FORCE** Bangkok, Thailand / CA / TX  
**Intelligence Officer (Captain)** 1993-1997

- Authored first comprehensive strategic study on Laotian drug trafficking situation and briefed findings to national-level policymakers. Analysis helped to arrest and extradite 4 traffickers for shipping 170kg of heroin into US market.
- Awarded two Air Force Medals for leading 6 rapid reaction teams of 20 people during overseas operations.
- Trained 27 personnel for the largest operational inspection in Air Force history. Improved team ranking from "satisfactory" to "outstanding."

### ADDITIONAL INFORMATION

Enjoy studying foreign languages such as Spanish (proficient), Italian and Thai. Other passions include international treks (Huaraz, Inca Trail in Peru), cultural exploration, and Duke basketball.

**MARCUS BENES**  
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### EDUCATION

**UNIVERSITY OF PENNSYLVANIA**, The Wharton School, Philadelphia, PA May 2001  
*Candidate, Master of Business Administration*, Finance  
• Member of the Finance Club and the Private Equity Club, as well as officer of the European Club.

**UNIVERSITY OF VIENNA**, Faculty of Law, Vienna, Austria November 1998  
*Doctor Juris*

**UNIVERSITY OF PENNSYLVANIA**, The Law School, Philadelphia, PA May 1996  
*LL.M.*, Concentration in Securities Regulations, Antitrust, and Intellectual Property.

**UNIVERSITY OF VIENNA**, Faculty of Law, Vienna, Austria January 1994  
*Magister Juris*, Concentration in the Laws of the European Community.  
• Graduated in the top 5% of class and received academic scholarships in 1991 and 1993 awarded on the basis of academic achievement.

### EXPERIENCE

**PNCCAPITAL MARKETS**, Philadelphia, PA May 2000 - August 2000  
*Summer Intern*  
Built financial models, analyzed and researched investment decisions, and drafted information memoranda.  
• Built model and drafted information memorandum for a \$404 Million credit facility provided to *KPMG Consulting, Inc.* and for \$565 Million asset-backed financing program provided to *Triton Container International Inc.*  
• Interviewed management team of and conducted market research for potential investment into *FBR CoMotion Venture Capital, L.P.*, a venture capital fund focusing on early stage investments in Seattle, Washington and Portland, Oregon.

**WOLF THEISS & PARTNERS**, Attorneys at Law, Vienna, Austria July 1997 - June 1999  
*Associate*  
Advised major multinational corporations (primarily financial institutions and credit institutions) on strategic business decisions and financing structures. Headed M&A teams and drafted due diligence reports.  
• Led teams of associates conducting due diligence. Acted as head counsel, supervised the drafting of the due diligence report, and advised CEO of major multinational investment fund during take-over negotiations.  
• Advised *DaimlerChrysler* on financing structure for their Austrian subsidiary and its authorized dealerships. Solved issues of cross-border financing within the European Union and the assignment of current and future receivables from the subsidiary to the financing credit institution.  
• Counseled Austrian investment fund on the incorporation of the *Value Profit Fund Ltd.*, Jersey. Wrote legal opinion on filing requirements and potential liability of the client who acted as custodian and principal paying agent. Evaluated tax effects for investors and negotiated with the Austrian Federal Agency for the Supervision of Investment Services.  
• Acted as head counsel for *General Electric Corporation* for the merger of two of its Austrian subsidiaries, now *GECapital Bank GmbH*, an Austrian credit institution. Drafted merger agreement, represented the client at shareholder meetings, and negotiated with the Austrian Federal Ministry of Finance.  
• Advised *GECapital Bank GmbH* on strategic business decisions. Wrote legal opinion on linking insurance policies with investments into investment funds, advised client on the sale of its Eastern European subsidiaries, and was responsible for the filings with the Austrian Federal Ministry of Finance and the Austrian Federal Trade Agency.

**PRESLMAYR & PARTNERS**, Attorneys at Law, Vienna, Austria January 1997 - June 1997  
*Associate*  
Advised multinational clients on the legal structures of their business ventures; in particular on the issues of shareholder control and tax effects of various forms of incorporation. Incorporated companies and drafted shareholders agreements, by-laws, and proxy agreements.

**CLERKSHIP AT THE CIVIL COURT OF APPEALS**, District of Vienna, Austria Sept 1994 - July 1995

### ADDITIONAL INFORMATION

Financed university studies in Vienna working part time at family owned business.  
Professional Affiliations: New York Bar Association; Austrian Bar Association.  
Languages: German, English, and Spanish (intermediate level).  
Interests: Gourmet cooking, traveling, skiing, and instructor for martial arts.  
Co-authored International Banking Law and Regulation: Austrian Chapter, Sweet & Maxwell Ltd.

**BRADLEYE.BERDOW**

825PineStreet,#6  
SanFrancisco,CA94108  
(650)279 -6630  
bberdow@hotmail.com

**EDUCATION**

**THEWHARTONSCHOOLOFBUSINESS,UniversityofPennsylvania** Philadelphia,PA  
MasterofBusinessAdministrationinEntrepreneurialManagement May2001

- RegionalDirector –EntrepreneurialJobFair2000Conference
- OtherActivities:WhartonIceHockey,EntrepreneurClub,TechnologyClub,MarketingClub

**UNIVERSITYOFPENNSYLVANIALAWSCHOOL** Philadelphia,PA  
JurisDoctor, *cumlaude* May 2001

- Analyzedandprepared20 -pagememorandumonstatusofInternetgambling

**THEWHARTONSCHOOLOFBUSINESS,UniversityofPennsylvania** Philadelphia,PA  
DualDegree:BachelorofScienceinFinanceandBachelorofArtsinHistory May1994  
*Magnacumlaude –TheWhartonSchoolandTheCollegeofArts&Sciences*

- Honors:TheWhartonSchoolofBusiness:Dean’sList(1991 -1993)  
TheCollegeofArtsandSciences:Dean’sList(1991 -1993)
- Activities:DeltaTauDeltaFraternity -FoundingFather

**EXPERIENCE**

**AMAZON.COM** Seattle,WA  
**Marketing/BusinessDevelopmentIntern,AmazonAuctions** Summer2000

- Co-developedmulti -dimensionalsegmentationschemeusedtoanalyzeauctionscustomer baseandpreparedmarketingplanbasedonfindings
- ManagedtheexpansionofFeaturedSalesauctionsintothesportscategoryandsuccessfully negotiatedwithvendorsforabaseballWorldSeriescollectiblesauction
- Recruitedpartnerstoparticipateinmajornewproductlaunchfortheauctionsdepartment

**WILSONSONSINIGOODRICH&ROSATI** PaloAlto,CA  
**SummerAssociate** Summer1999

- Analyzedanddraftedventurecapitalagreementsandincorporationdocumentsforstart ups
- Reviewedandcritiquedbusinessplansofnewclientsseekingventurefinancing

**FRIED,FRANK,HARRIS,SHRIVERANDJACOBSON** NewYork,NY  
**SummerAssociate** Summer1998

- Researched, analyzed, anddraftedagreementsformergersandacquisitions
- Preparedmemorandumonidealcorporategovernanceinparent -subsidiaryrelationships

**CREATIVEMARKETINGCONCEPTS** Atco,NJ  
**Co-Founder/VicePresident/Consultant** 1995 -1997

- Co-foundedcompanyspecializingindirectmarketingsalesofsportsmemorabilia
- Negotiatedwithwell -knownprofessionalathletesforappearances,autographs,andotherrights
- Recorded\$2millioninrevenuesin2yearsandwasoneofthelargestsuppliers ofsportscollectiblestoTheHomeShoppingNetworkandValuevisionInternational

**THESCOREBOARDINC.** CherryHill,NJ  
**SportsProductManager** 1994 -1995

- Co-managedallaspectsofcompany’sfootball,baseball,andracingsportsproductlines
- Analyzedsportsandmemorabilia marketstodevelopnewproductsandathleteagreementproposals
- ProgrammedsportscollectibleshowsforQVCcables hoppingnetwork

**ADDITIONALINFORMATION**

Enjoybasketball,guitar,andtraveling.Avidsportsfanandcollectorofmemorabilia.PassedCBar,July2001.

**MAURICEBERNS**  
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Philadelphia, PA 19103  
(215) 546 - 7248 - maberns@wharton.upenn.edu

### EDUCATION

**THE WHARTON SCHOOL**, University of Pennsylvania, Philadelphia, PA  
Master of Business Administration Candidate, Finance Major, degree expected May 2001  
**Director's List, Fall 1999 & Spring 2000** (top 10% of class), 1<sup>st</sup> Year Honors  
Activities: Wharton Latin American Student Association Social VP, Wharton Global Consulting Practicum, European Club Latin American Conference Fund Raising, Milken Young Entrepreneurs Mentorship Program

**DUKE UNIVERSITY**, Durham, NC, 1989 - 1993  
Bachelor of Arts Degree ( *Magna Cum Laude* ) in Public Policy Studies (focus on international policy) and German  
**G.P.A. 3.71/4.00**, Dean's List with Distinction 1992 - 1993, Dean's List 1990 - 1991  
Studied abroad through University of Cincinnati Work - Study Program in Hamburg, Germany, Fall 1991

### EXPERIENCE

#### **MCKINSEY & COMPANY**

**Summer Associate**, Summer 2000

*Miami, FL*

- Helped to define a launch strategy for \$1.4 Billion indirect goods B2B e-commerce marketplace in Latin America for a major European telecom; conducted competitive market analysis to determine target market segments and value proposition
- Led client team implementation for value added services roll-out, including fulfillment, payments, & customer care

#### **WINTERSHALLENERGÍA**

**Subsidiary of BASF** - Exploration and production of oil & gas worldwide

**Assistant Marketing Manager**, 1996 - 1999

*Buenos Aires, Argentina*

- Led cross-functional team in analyzing and achieving Board approval for an LPG project (\$93 Million) and a pipeline project (\$140 Million), that together increased revenues by \$55 Million/year
- Negotiated 15-year natural gas contracts for up to 6 million m<sup>3</sup>/day comprising contract values up to \$1.5 Billion
- Implemented natural gas strategies that ultimately gained 7% additional share from market price leader
- Researched and profiled petroleum and natural gas markets in Argentina, Chile, and Brazil
- Supervised oil & gas sales totaling \$180 Million/year in Merco Sur, including delivery and export formalities

**INTERMARE ENERGIEHANDEL** - Energy trading activities in Europe and Russia

**Assistant Project Manager**, 1995 - 1996

*Moscow, Russia*

- Developed pre-financing project of \$17 Million between European banks and Russian crude oil producers
- Managed 5-person multi-cultural team that negotiated Romanian refining project, leading to 15% increase in revenues; established joint-venture and marketed petroleum derivatives into Moldavia, Hungary, and Ukraine

**Crude Oil Trader**, 1993 - 1995

*Hamburg, Germany*

- Traded physical crude oil through sales and barter transactions; team turnover of \$300 Million/year
- Coordinated banking and contractual operations; used hedging and swap to protect open positions

#### **MERRILL LYNCH**

*New York City, NY*

**Intern in Commodities Research**, Summer 1993

- Analyzed and disseminated information on daily fundamental and technical developments in the energy markets

**VECTOR MARKETING** - Direct marketing of Cutco cutlery

**Branch Manager**, 1991

*Mentor, OH*

- Established downstart-up to market Vector's products; recruited, trained & supervised sales force of 68 representatives
- Motivated team to achieve 12<sup>th</sup> highest sales out of 114 branches nationally

**Sales Representative**, 1990

*Cleveland, OH*

- Developed lead base of over 300 customers through warm-calling and networking; supervised team of 5
- Achieved highest personal sales in the Midwest Zone, ranked 9<sup>th</sup> nationally out of 15,000 representatives

### ADDITIONAL INFORMATION

Fluent in German and Spanish, conversational Portuguese, beginner-level French and Russian.  
English language instructor to Argentine businessmen for 6 months while learning Spanish and searching for a job.  
Interests include: soccer, running (four marathons) and golf. Worked and traveled in over 35 countries.

**TATIANANIKITINA -BERWICK**

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215-563-4068

**EDUCATION**

**The Wharton School, University of Pennsylvania**

Philadelphia, PA

Master of Business Administration Candidate May 2001

Wharton Tech Club and e-Commerce Club; panel manager for the Tech conference '2000

Selected for Wharton Global Consulting Practicum to advise Israeli wireless telecom software start-up focused on optimizing spectral efficiency for CDMA, TDMA, and GSM technologies.

**Northeastern University**

Boston, MA

BS in Business Administration

GPA: 3.9/4.0

December 1995

**St. Petersburg State University**

St. Petersburg, Russia

Economics of Research & Development

GPA: 3.9/4.0 September 1989

-June 1992

**WORK EXPERIENCE**

**Asera, Inc.**

Belmont, CA

*Business Development Intern*

Summer 2000

- Developed an OEM strategy for Asera. Identified key target to pursue, proposed various pricing models to employ and suggested implementation timeline
- Presented recommendations for partnerships with system integrators to build vertical practice areas

**Bain and Company**

Boston, MA

*Senior Associate Consultant*

January 1996

-August 1999

*Addressed a broad range of strategic and operational issues for a diverse set of clients (conducted 16 projects in 10 industries).*

Examples of Specific Projects

*Financial Services Company*

- Developed blueprint for growth by providing financing to VARs and distributors of computer products. The plan identified financing product features, operational and sales force coverage

*Canadian Cable Company*

- Redesign channel package sold to customer to increase revenue per subscriber (including cable modem)

*Coated Paper Manufacturer*

- Supported renegotiation of outbound freight contracts
- Developed expansion strategy for pressure-sensitive label business unit

*Bowling Equipment Manufacturer*

- Led a group of 15 engineers to develop market -acceptable functionalities for the low -end bowling equipment in response to lower -priced competitors

**Reebok International**

Stoughton, MA

*Intern, Product Development and R&D division*

1998

- Develop Rapid Prototyping (new technology in developing production molds) Implementation Plan by assessing the technology impact on all areas of Reebok's operations

**St. Petersburg Stock Exchange**

St. Petersburg, Russia

Securities Department

April 1991

-July 1992

- Designed trading formats and procedures. Issued weekly analytical bulletins. Organized seminars for traders.

**ADDITIONAL INFORMATION**

- Languages skills: fluent in Russian
- Interests: running, mountain biking, classical piano, rock music, adventure racing, rock climbing

**J. THOMAS BEVAN**  
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Gladwyne, PA 19035  
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## EDUCATION

**THE WHARTON SCHOOL, University of Pennsylvania** Philadelphia, PA  
**Master of Business Administration Candidate** May 2001  
Fellow, Wharton Fellows Fund (\$250,000 student - runs small cap value portfolio)  
Vice President, Investment Management Club

**UNIVERSITY OF PENNSYLVANIA** Philadelphia, PA  
**M.S. Ed. in TESOL, Teaching English to Speakers of Other Languages** May 1992  
**M.A. in Creative Writing**  
Cumulative Grade Point Average: 4.0

**COLGATE UNIVERSITY** Hamilton, NY  
**B.A. in English Literature** May 1989  
Cum Laude; Phi Beta Kappa; Lambda Alpha, Anthropology Honorary; 1989 Allen Prizes in English Composition

## EXPERIENCE

**CAPITAL RESEARCH & MANAGEMENT COMPANY (THE CAPITAL GROUP)** Los Angeles, CA  
**Equity Research Analyst** Summer 2000

- Initiated coverage of and made investment recommendations on the apparel manufacturing industry.
- Companies covered include Jones Apparel Group, Liz Claiborne, VF Corp, Tommy Hilfiger, Polo Ralph Lauren.
- Published and presented to portfolio managers and analysts a comprehensive industry review, with investment recommendations, after meeting with senior management, building financial models and analyzing industry fundamentals.

**THE ACADEMY OF AMERICAN POETS** New York, NY  
**Director of Marketing & Promotion** 1997-1999

- Started and directed The Poetry Book Club, a mail-order catalog business selling poetry books.
- Initiated and managed all aspects of the ongoing business, including multi-year budgeting and business modeling, purchasing, sales, production, fulfillment, editorial, and customer relations.
- Developed a program - launching direct-mail packages that generated a 5% response rate (2-3 times the industry standard).
- Built and maintained marketing relationships with outside organizations, including The New York Times, Borders Books & Music, and Yahoo!, and sponsorship relationships with over 90 other organizations, around National Poetry Month.
- Developed and managed the Journal Advertising Sales program.

**Program Associate** 1995-1997

- Launched the first-ever annual National Poetry Month, through which poetry is promoted nationwide in concert with thousands of booksellers, libraries, schools, and other institutions.
- Performed all sales, budgeting, advertising, production, editorial, and fulfillment for a poetry on audiotope program.

**Executive Assistant and Office Manager** 1994-1995

- Liaison with Chancellors and Board members on behalf of the Executive Director and President

**BOULEVARD, Journal of Contemporary Writing** Philadelphia, PA  
**Managing Editor** 1990-1994

- Coordinated with the editor, outside reviewers, and vendors in all aspects of managing and publishing the magazine.

**THE JOURNAL OF BUSINESS VENTURING** Philadelphia, PA  
**Managing Editor** 1990-1993

- Independently managed and performed all daily in-house operations of this bi-monthly international academic journal.
- Transformed a three-issue manuscript deficit into a three-issue surplus to allow for a 20% increase in per-issue page count.

## ADDITIONAL INFORMATION

**LEADERSHIP ACTIVITIES:** ABC/ABETTER CHANCE, INC. in Lower Merion, Ardmore, PA, 1990-1994, 1999-present  
**Board of Directors:** Elected in 1993 to the Exec. Committee of this all-volunteer educational organization for talented minority youths.

**OTHER ACTIVITIES:** Running, hiking, squash. Conversational in French.

**INTERESTS:** Active investor in individual stocks for more than eighty years.

**MICHAEL J. BEVAN**  
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W Conshohocken PA, 19428  
(610) 832 -0330

### EDUCATION

**THE WHARTON SCHOOL, University of Pennsylvania** Philadelphia, Pennsylvania  
Masters of Business Administration Candidate May 2001  
*Concentration: Finance and Entrepreneurial Management*

**DENISON UNIVERSITY** Granville, Ohio  
**Bachelor of Arts, English** May 1993  
Honors: Dean's List, Fall Semester 1991 - Spring Semester 1993

### EXPERIENCE

**CAMBRIDGE TECHNOLOGY CAPITAL, VENTURE CAPITAL** Cambridge, Massachusetts  
**Senior Associate** May 2000 - August 2000

- Discovered, negotiated, and lead investments in two early stages software companies.
- Helped refine CTC investment process, and implement standard due diligence procedures.
- Conceptualized and formulated strategy for CTC accelerator program.

**SAFEGUARD SCIENTIFICS, VENTURE CAPITAL** Wayne, Pennsylvania  
**Associate, TL Ventures** August 1996 - July 1999

- Managed six portfolio companies, and aided in resolving organizational, financial, legal, and managerial issues. Investments included: VerticalNet (NSDQ: VERT), PacWest Telecom (NSDQ: PACW), Capstone Turbine (NSDQ: CPST), Coastal Security, Intellon Corp, and Interactive Media.
- Served as acting Chief Operating Officer for troubled software company in firm's portfolio.
- Sourced and developed potential investments, joint ventures, partnerships, acquisitions and divestitures for firm and portfolio companies.

**SEI INVESTMENTS, FINANCIAL SERVICES COMPANY** Wayne, Pennsylvania  
**Senior Account Executive, Liquidity Management Group** June 1995 - July 1996

- Increased assets under management by over \$1 billion.
- Managed three sales professionals and covered territory consisting of 17 states.
- Assisted on all sales made by group and personally increased bank relationships by 40%.
- Redefined national sales process and delivery of cash management software.

**Product Manager, New Business Development Group** July 1994 - May 1995

- Designed and articulated market entry strategy for commercial banking software in the U.S. banking market.
- Negotiated strategic partnerships with financial intermediaries.
- Structured and led national marketing campaign.
- Defined pricing and compensation structure for sales teams.
- Managed evolution of mainframe software to Windows based offerings for middle market banks.

**Assistant Product Manager, New Business Development Group** June 1993 - June 1994

- Helped to conceptualize and design two investment related software products.
- Evaluated and segmented the target markets, forecasted demand, and projected cash flows for sales.
- Created products and helped package, position, price, and market the products for national release.
- Managed ongoing support of offering to banks, brokerage firms, and investment advisors.
- Published articles in: *Bank Director*, *Bank Securities Journal*, *Solutions*, *Investment Insights*.

### ADDITIONAL INFORMATION

**NASD Licenses:** Series 7, 63

**Interests:** Antique Car Restoration, Mountaineering, Triathlons

**SUJATAN.BHATIA, CPA**  
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## EDUCATION

**THE WHARTON SCHOOL, University of Pennsylvania** Philadelphia, PA  
**Master of Business Administration Candidate** May 2001

- Majors: Finance, Health Care
- Editor-in-Chief – Wharton Journal; Co-President - Volunteer Income Tax Assistance Program
- Member of Finance Club, European Club, Wharton Women in Business, and Wine Tasting Club
- GMAT – 790

**BOSTON UNIVERSITY – SCHOOL OF MANAGEMENT** Boston, MA  
**Bachelor of Science in Business Administration, *Magna Cum Laude*, Cum. G.P.A. 3.6** May 1995

- Concentrations: Finance and Accounting, G.P.A. 4.0, 3.6
- Activities/Honors: Elected Chapter President, Beta Alpha Psi; Member, Beta Gamma Sigma (top 5% of class)

## EXPERIENCE

**GOLDMANSACHS INTERNATIONAL, Investment Banking Division** London, England  
**Summer Associate – Communications, Media, and Technology Group** Summer 2000

- **Capital Markets** Participated in preparing LSE IPO for Deutsche Telekom's wireless mobile division: drafted prospectus, modeled business plan, created equity story, and prepared management Q&A for analyst presentations
- **Mergers & Acquisitions** Analyzed strategic alternatives for \$3bn internet company, performed due diligence, and identified acquisition candidates; Assisted in analyzing potential \$12bn consumer goods merger to determine optimal financial structure and expected synergies

**BAIN & CO.** London, England  
**Summer Consultant** Summer 2000

Participated in Summer Consultant orientation and strategy exercises

**ERNST & YOUNG LLP, Business Advisory Group** Boston, MA  
**Senior Consultant** 1997-1999

One of the few Senior Consultants hired directly from the firm's Audit practice

- **Mergers & Acquisitions** Performed due diligence and developed 3-year financial forecasts for \$25 million merger of 16 physician foundations; Reengineered financial processes to capture post-merger cost synergies of \$3 million
- **Financial Modeling & Analysis** Developed cash flow models for 25 separate physician practices targeted for acquisition; Reviewed business plans, summarized "buy" recommendations, presented findings to Hospital CFO
- **Research & Analysis** Conducted market assessment for call center; Performed industry & competitor analysis identifying potential to increase market share and revenues by \$10 million; Developed benchmarking study of staffing levels, compensation, & productivity indicators
- **Leadership & Management** Acted as interim controller for \$4 million alternative medicine facility; Independently supervised staff of 8 accounting/finance personnel; Created 5-year strategic business plan to complement organization's 100+% annual growth

**ERNST & YOUNG LLP, Assurance & Advisory Business Services** Boston, MA  
**Senior Auditor** 1997-1999

Consistently rated as top performer within peer group of 40 persons

- **Financial Statement Preparation & Analysis** Prepared and analyzed consolidated financial statements for publicly and privately held clients in a range of industries (Technology, Aerospace, Health Care, Consumer Goods)
- **Leadership & Management** Managed, trained, and conducted performance reviews of teams of up to 7 professionals providing audit and due diligence services
- **Project Management** Planned, executed, and supervised audit engagements from planning to final report issuance

## ADDITIONAL INFORMATION

- Certified Public Accountant, Massachusetts
- Board of Directors, Treasurer, and Counselor for Hugh O' Brian Youth Leadership Foundation (1996-1999)
- Avid traveler – recent adventures include camping in a jungle in Thailand and trekking through Costa Rica
- Interests include: skiing, running (slowly), and collecting classic VW bug mini-replicas

**TIFFANY M. BINDER**  
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## EDUCATION

### **THE WHARTON SCHOOL, University of Pennsylvania**

Philadelphia, PA  
May 2001

#### ***Masters of Business Administration Candidate in Finance***

- Elected Cohort Athletic Representative; Christmas in April House Selection Committee; Wharton Women in Business Admissions Committee
- Member of Wharton Finance Club and Wharton Wildmen Ice Hockey Team
- First Year Honors, Director's List - Spring 2000

### **COLGATE UNIVERSITY**

Hamilton, NY  
May 1995

#### ***Bachelor of Arts, Dual Major in Economics and Political Science***

- Phi Beta Kappa, Magna Cum Laude, High Honors in Economics
- Junior Year Abroad - Member of Colgate's selective London Economics Study Group in Fall 1993
- Colgate Student Senate, Kappa Alpha Theta Sorority, Colgate *Maroon*-News reporter

## EXPERIENCE

### **GOLDMAN, SACHS & CO.**

New York, NY  
Summer 2000

#### **Investment Banking Division**

##### *Summer Associate*

- Participated in a \$350 million initial public offering of Axcelis Technologies, a semiconductor equipment manufacturer. Assessed company valuation, drafted selling memorandum, and managed documentation and roadshow processes.
- Advised Saks Incorporated on recently announced spin-off of Saks Fifth Avenue Enterprises. Drafted preliminary SEC filing related to the transaction and assisted in the preparation of Board of Directors presentation.
- Evaluated potential buyers for a division of a major consumer products company. Created pro forma accretion/dilution models and performed strategic analysis for seller.

### **PRICEWATERHOUSECOOPERS LLP**

New York, NY  
1995 -1999

#### **Corporate Value Consulting Group**

- Developed and utilized financial models for valuation of public and private companies, intangible assets, and shareholder equity using standard valuation methodologies (market multiple analysis, transaction analysis, discounted cash flow analysis).
- Reviewed and analyzed financial data, projections, and industry indicators to assess performance and expectations of subject companies involved in restructuring, mergers and acquisitions, litigation and gift and estate tax planning.

##### *Associate 1998 -1999*

- Managed team that estimated the value of a Philippine semiconductor manufacturer. Researched the domestic and international semiconductor industry and analyzed the implications of the Asian economic crisis on the financial condition of the business. Presented results to client management.
- Determined the value of a major international investment bank for a significant minority shareholder in connection with an initial public offering. Served as liaison to the client's chief financial officer.
- Promoted to Associate, a position previously offered solely to MBA graduates.

##### *Senior Analyst 1997 -1998, Analyst 1995 -1997*

- Assessed the financial condition and calculated the value of a large, national insurance company during major restructuring. Led management interviews and presentation of results to majority shareholders.
- Supervised a team of analysts that determined the fair market values and use of full lives of the tangible and intangible assets inherent in the business of a major computer periodical publisher. Reviewed the results, which were used in preparation for the company's initial public offering.
- Coordinated undergraduate recruiting program for the New York valuation group.
- Selected by senior management to develop a Market Approach template which was implemented by the national valuation group.

## ADDITIONAL INFORMATION

- Interests include running, skiing, boating, and genealogy.

## JENNIFER L. BISHKO

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### EDUCATION

#### THE WHARTON SCHOOL, University of Pennsylvania

Philadelphia, PA

MBA Candidate; Majors in Finance and Entrepreneurial Management

May 2001

- Recipient of Wharton Grant (merit -based scholarship)
- CFO and VP of Sales for LucidView, a start-up company offering an internet-based recruiting tool that facilitates the exchange, analysis and use of perceptual feedback between students and recruiting companies
- Selected for consulting team that assisted GES small Business Solutions in the development of its Internet strategy
- Elected Cohort Social Representative; Member of Private Equity Club, Women in Business Club, Wharton ice hockey team

#### DARTMOUTH COLLEGE

Hanover, NH

Bachelor of Arts in Psychology

June 1994

- Dartmouth Study Abroad Program, Mainz, Germany, Spring 1992
- Elected by class to Programming Board and Student Assembly; selected by College Deans to serve on Committee on Student Life

### EXPERIENCE

#### SAFEGUARD SCIENTIFICS, INC.

Wayne, PA

Communications Investment Group, Summer Associate

May 2000 - Present

Identified and evaluated investment opportunities for Safeguard Scientifics, a publicly-traded operating company (NYSE: SFE) that acquires and operates technology companies focused on the Internet infrastructure market.

- Exclusively focused on investment opportunities in the telecommunications and Internet infrastructure technology sectors.
- Analyzed potential investment opportunities, assessed management teams, evaluated market potential, and researched private and public competitors.
- Conducted due diligence, interviewed key customers, developed financial projection models, performed valuation analyses and presented to investment committee.
- Assisted in advising partner companies on developing operating strategies, identifying market segments, researching industry trends, evaluating growth opportunities and analyzing exit alternatives.
- Contributed to partner company board presentation on the future direction of telecommunications networking technology.
- Attended conferences and advisory board meetings to source investment opportunities and identify potential co-investors.

#### CITICORP SECURITIES, INC.

New York, NY

Capital Structuring Group, Assistant Vice President

1997-1999

Structured, presented and executed private transactions for Fortune 200 companies to raise tax-deductible minority interest equity and achieve accounting, rating agency and additional ancillary benefits.

- Actively participated in structuring financings that raised over \$1.4 billion of minority interest equity. Recognized for contribution to deals that received two of the 1997 Global Relationship Bank Customer Solution Awards.
- Presented complex transactions and led follow-up discussions with client CFOs and Treasury teams, bank groups, equity investors, and corporate and tax lawyers.
- Evaluated business rationale and financial returns for each transaction.
- Demonstrated impact of deals on clients, lenders and investors by composing debt and equity offering memoranda and creating financial models for GAAP, partnership accounting and tax purposes.
- Actively participated in drafting of term sheets, partnership agreements and other documents. Led due diligence efforts and certain client, lender and investor negotiations that addressed financial and structural issues.

#### Global Chemicals and Pharmaceuticals Group, Analyst

1994-1996

- Prepared analyses for marketing and approval of project financings, off-balance sheet lease structures and other products.
- Received 1995 Relationship Bank Associate of the Year Award for excellence; only Analyst to receive this honor.
- Only Analyst from class of 35 promoted to Associate level and invited to join 5-month trainee program reserved for MBAs.

#### Global Finance Analysis Division, Research Intern (London, England)

June-Sept. 1993; Sept. -Dec. 1992

### ADDITIONAL INFORMATION

- SEC Series 7 and 63 certified
- Fluent in French, conversational in German
- Christmas in April ★ Manhattan Founding Director, Treasurer and Fundraising Co-Chairperson, 1997-1999
- Enjoy mogul skiing, golfing, mentoring students, and traveling; travel has included U.S., Europe and Southeast Asia

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## EDUCATION

**THE WHARTON SCHOOL and THE LAWSCHOOL, University of Pennsylvania** Philadelphia, Pennsylvania  
**Master of Business Administration Candidate** May 2001  
**Majors in Finance and Entrepreneurial Management**  
**Juris Doctor Candidate** May 2001  
Wharton: selected to Executive Board of Christmas in April (governing body), responsible for recruiting non-Wharton grad students;  
Teacher's Assistant for Securities Regulation at Wharton and the Law School;  
Member of Best Buddies (non-profit organization providing friendship and support to people with mental retardation).  
Law School: selected as Editor of Journal of International Economic Law, wrote thesis on NAFTA's effect on Mexican workers;  
Intern at Mayor's Office of Policy and Planning, analyzed work programs, Census 2000, and gun control issues for Deputy Mayor.

**UNIVERSITY OF SOUTHERN CALIFORNIA** Los Angeles, California  
**Bachelor of Science in Accounting, magna cum laude** May 1997  
**Bachelor of Arts in Psychology, magna cum laude** May 1997  
Rhodes Scholar Semifinalist; Phi Beta Kappa; Trustee Scholar (full academic scholarship); RHP program (skipped 12<sup>th</sup> grade).  
Varsity Football Team (first Trustee Scholar to play Varsity Football); Fundraising Chair of Psychology Honor Society.

**MOSCOW STATE UNIVERSITY & UNIVERSITY OF CAMBRIDGE** Moscow, Russia and Cambridge, England  
**Russian Language Summer Immersion Program & International Summer School** 1998 & 1995

## EXPERIENCE

**McKINSEY & COMPANY** London, England  
**Summer Associate** Summer 2000  
• Advised senior management of an internet company on strategy, including acquisition analysis, market positioning, growth strategies, and determining costs and value added for ongoing activities.  
• Analyzed competitors and potential acquisitions of UK, European, and US competitors, including running negotiations and valuing competitors through modeling and determining best strategic value and fit with the client.  
• Evaluated software and picture technology from the end-user and client point of view, involving learning the software in great detail and conducting detailed interviews.

**LINKLATERS** London, England and Hong Kong  
**Summer Associate, Corporate and Securities Departments** Summer 1999  
• Drafted prospectuses, investor letters, block trade, and international security documents.  
• Conducted due diligence for clients, including analyzing government changes and profit forecasts in an unstable legal environment.  
• Reviewed debt covenants, accountants' representations, and SEC filings for clients including Telecom Eireann in the largest privatization in Europe in 1999, Chinese land development companies, Indian software company, and Papua New Guinea.

**EXXON CORPORATION** Houston, Texas  
**Summer Clerk, Tax Law & Planning Division** Summer 1998  
• Led four person project to seek tax refunds in over 20 counties which involved supervising another department and two full-time employees, and interacting with 10 cities in a different state.  
• Researched and analyzed cases and statutes, and wrote memoranda on tax issues including transfer pricing, equipment classification for tax purposes, and structuring a \$100 million oil pipeline acquisition.

**NEIGHBORHOOD ACADEMIC INITIATIVE** Los Angeles, California  
**Charter President of Tutoring Program, Tutor** 1993-1997  
• Created and led student-run tutoring program for inner-city students that began with 5 students and 3 tutors and expanded to 150 students and 50 tutors, from vastly different backgrounds. Featured in Time, Wall Street Journal, and on CBS Evening News.  
• Designed program structure, balancing needs of program staff, students, tutors, teachers, and USC.  
• Selected and interviewed first management team of 5, developed mission statement and goals.  
• Achieved exciting results: 60 percent of inner-city students went on to college.

## DANIELLA WRENCEBLATT

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### EDUCATION

#### THE WHARTON SCHOOL and THE JOSEPH H. LAUDER INSTITUTE

University of Pennsylvania

Philadelphia, PA

May 2001

Master of Business Administration candidate: Finance and Entrepreneurial Management

Master of Arts candidate: International Studies – Western Europe and France

- Lauder Director's List, *Academic year 1999-2000.*
- Business and Cultural Immersion Program - Paris Chamber of Commerce, *Summer 1999.*
- Elected Cohort Treasurer; Volleyball Club; Lauder Admissions Host.

Paris, France

#### BATES COLLEGE

Lewiston, ME

Bachelor of Arts in Economics, minor in German

May 1993

- Dean's List five of seven semesters, Economic tutor, Volleyball team member, Senior Social Representative.

Institut für Europäische Studien: International Economics and German semester abroad, *Spring 1992.*

Vienna, Austria

Goethe Institut: Intensive German Language and Culture courses, *Summer 1991.*

Düsseldorf, Germany

Université de la Sorbonne: Conversational French, History and Civilization courses, *Summer 1990.*

Paris, France

### EXPERIENCE

#### eTECHTRANSFER.COM

Philadelphia, PA

Vice President, Business Development – North America

April-September 2000

- Developed business plan, refined strategic direction and implemented start-up business with several Wharton classmates.
- Presented product offering to clients and directly cultivated and maintained client relationships.
- Additionally, carried out CFO duties, including financial modeling and presentation to seed-stage and venture capital investors.
- Winner of Second Annual Wharton Business Plan Competition.

#### WARBURG DILLON READ

London, England

Associate Director, Corporate Finance – Consumer Goods Sector Team

1999

Associate, Corporate Finance – Mergers & Acquisitions

1996-1998

- Primary responsibilities included European client coverage (transaction origination/new business development), transaction execution and primary liaison with New York office for trans-Atlantic client coverage.
- Provided strategic advisory and valuation analyses of public and private companies for sales, acquisitions and divestitures, including modeling and analysis of acquisition effects, financing alternatives and LBO opportunities.
- Drafted offering memoranda, organized deal teams and conducted auction processes.
- Recent experience includes: managed sale of Diageo UK frozen potato business; advised on LBO bid for a Scandinavian flatbread producer; won co-manager role in privatization of Korean tobacco monopoly.
- Selected as member of London integration team for Dillon Read during SBC Warburg merger process.

#### DILLON, READ & CO. INC.

New York, NY

Analyst, Corporate Finance

1993-1995

Summer Intern, London

Summer 1991

- Includes one year in Financial Institutions Group and remainder in generalist M&A.
- Compiled comparable company trading statistics and precedent transaction analyses, created acquisition effects, break-up and debt capacity models.
- Worked directly with the Treasurer of Honeywell Inc. to create a cash allocation policy presentation and assembled a comparative working capital analysis which enabled divisional benchmarking.

#### LIVIASA

Paris, France

Foreign Export Representative

Summer 1992

- Monitored inventory, created weekly control updates, contacted and coordinated with the regional representatives in French, German and English to arrange prompt delivery of materials and products for this high-fashion sports wear company.

### ADDITIONAL INFORMATION

- Native English/French, intermediate German and Spanish, limited Italian and Hungarian.
- Avid downhill skier, windsurfer, volleyball player and PADI-certified SCUBA diver.
- Play guitar and mandolin, enjoy classical and contemporary music, cooking, wine and humor.

## **JONATHAN BLOOMBERG**

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### **Education**

**THE WHARTON SCHOOL – University of Pennsylvania, Philadelphia, Pennsylvania** May 2001

- MBA Candidate – Finance and E – Commerce Major
- Extracurricular: member Finance, Private Equity, and Wildmen Ice Hockey Clubs

**TUFTS UNIVERSITY, Medford, Massachusetts** May 1992 - June 1996

- BA Economics
- GPA 3.57, Include. Oxford GPA 3.68
- Member, Dean's List (eight times recipient), 1992 – 96
- Extra Curricular: member/Rush Chair Delta Tau Delta Fraternity, academic peer advisor, captain of intramural ice hockey team

**OXFORD UNIVERSITY, Oxford, England** January - June 1995

- GPA 3.94
- Study of European Economic Issues, Politics, and Literature
- Extracurricular: rowing team, tennis team

### **Employment**

**RXPLUS, Toronto, Canada** May 00 – August 00

#### ***Manager Business Development***

- Sole project and business manager for internet initiative B2B insurance exchange product
- Performed all financial and operational diligence and analysis required to submit bid on potential \$25 million strategic acquisition
- Initiated new line of business resulting in a \$5 million additional revenue annuity

**SG CAPITAL PARTNERS LLC, New York, New York** July 98 – July 99

#### ***Senior Analyst***

Involved in all processes of private equity and venture capital investments

- Extensive leverage buyout valuation experience
- Active participation in detailed financial and operational due diligence
- Created and implemented business plan in portfolio company
- Transaction experience in the following industries: High Tech, Location Based Entertainment, Media, Telecommunications, Education

**SALOMON SMITH BARNEY, New York, New York** July 96 – July 98

#### ***Financial Analyst, Technology Corporate Finance***

- Participated in Equity Offerings, High Yield Financings, Divestitures and Leveraged Buyouts
- Extensive valuation experience using public market comparables, private market transactions and discounted cash flow analysis
- Actively participated in both financial and operational due diligence sessions and SEC document drafting sessions
- Representative transactions include:  
CompuServe/WorldCom/America Online – M&A,  
The DII Group and Unisys Corporation – High Yield Offerings  
Elbit Systems – Secondary Offering

### **Interests**

- Golf, ice hockey, tennis, snow -boarding, rowing, world travel, reading, managing personal portfolio

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## EDUCATION

**THE WHARTON SCHOOL**, University of Pennsylvania Philadelphia, PA  
**Master of Business Administration Candidate** May 2001

- Dual Major in Marketing and Finance
- Co-Captain, Wharton Soccer Team; Member of Marketing and Technology Clubs; Undergraduate Mentor ; Volunteer, Christmas in April

**STANFORD UNIVERSITY** Stanford, CA  
**Bachelor of Arts, double major in Economics and Communication** June 1992

- Co-Captain, Men's Varsity Soccer Team; Account Executive, The Stanford Daily

## EXPERIENCE

**INTEL CORPORATION** Folsom, CA  
**Product Marketing Intern** Summer 2000

- Spearheaded the development of an interactive marketing tool by coordinating the efforts of more than 45 individuals worldwide. The marketing tool pioneered the effort to sell platform solutions to small and medium businesses through Intel's worldwide channel of dealers.
- Decided to feature Intel components such as the Pentium® III processor, branded desktop motherboard, chipset and wireless networking devices. Made the marketing tool available in 13 languages and built it to be flexible to meet the various needs of a worldwide audience of consumers who buy through a channel of 40,000+ dealers in 106 countries.

**THE QUAKER OATS COMPANY** Pleasanton, CA and Phoenix, AZ  
**Customer Marketing and Sales** 1992 to 1999

*Promoted to highest -level account management responsibility after starting as entry-level sales representative and receiving four subsequent promotions. Position evolved to broker and analytical team management roles prior to managing the customer marketing for key brands such as Cap'n Crunch and Life Cereal.*

### Customer Marketing and Sales Management

- Managed \$20 Million customer marketing budget for businesses that generated \$80 Million in annual sales.
- Analyzed trends, price sensitivity, competitive activity and promotional effectiveness to recommend tactical shifts in depth of promotional pricing and frequency as well as distribution drive on void products. Activities drove improved profitability of Life Cereal by 20% and grew share by 15%.
- Identified opportunity to increase promoted prices and reduce advertising frequency at unprofitable customers to drive results that were best of 8 regions across the USA. Activities resulted in growth in profit of 11% while also increasing share of Instant Quaker Oatmeal 7%.

### Analytics

- Increased distribution and grew sales and profits of Quaker Bagged Cereal 15% through analysis of private label interaction with branded and bagged cereals.
- Spearheaded analyses for category management processes to improve profitability through efficient product mix identification, increase of inventory turns, effective depth and frequency of promotions and competitive pricing.
- Played integral role in the design, implementation and execution of customer marketing and sales planning software system that is the Gold Standard for the industry.

### Leadership/Business Management

- Directed 100+ person retail brokerage for the largest territory in the western region. Set measurable retail distribution and shelf management objectives and ensured goals were met.
- Led 4-person team responsible for customer marketing and sales support.
- Executed pricing, shelf management and distribution strategies as well as the profitable management of trade promotions. Negotiated promotional contracts.

## ADDITIONAL INFORMATION

- Led a team of six in a market research project for an Internet start-up, yet2.com
- Played key role in an online strategic marketing project for Bristol Myers Squibb
- Baby sign language, scuba diving, skiing, youth soccer coach, volunteer for youth group for blind children

## MARCIO AUGUSTO BORUCHOWSKI

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### EDUCATION

**THE WHARTON SCHOOL**, University of Pennsylvania, PA

**MBA Candidate, Dual Major in Finance and Strategic Management**

May 01

- Member of Sales & Trading, M&E and Investment Management professional clubs
- President of the Wharton Latin American Association; member of the Soccer Club and Admission Committee Volunteer

**ESCOLA POLITECNICA A**, University of Sao Paulo, Brazil

**BS, Industrial Engineering**

Dec 96

- Converted GPA of 3.8/4.0; Part-time work in a consulting firm
- Study Foundation academic excellence scholarship recipient

### EXPERIENCE

**GOLDMAN, SACHS & CO.** London, UK

Summer Associate, Fixed Income Currency & Commodities Division

June 00 – Aug 00

- Rotated through different trading desks, including High Yield, Credit Trading, Emerging Markets, and Commodities
- Participated in daily classes covering market dynamics, and presented to summer associates and professional on assigned topics and trade ideas
- Project completed in the Distressed Bonds Group; researched the potential recovery rate of an Internet Company

**GARANTIA INVESTMENT BANK**, São Paulo, Brazil

Fixed Income Trader, Fixed Income and Foreign Exchange Desk

May 97 – Jun 99

- Operated and controlled the cash of the investment bank, from the distributor, brokerage house and commercial bank; responsible for daily financing operations of US\$2.5 billion
- Controlled two fixed-income foreign capital funds and one local investment fund, both with own resources totaling US\$200 million.
- Represented the bank at the Central Bank's fixed-income desk as one of the 25 dealers of the Central Bank
- Coordinated the distribution and settlement of the Garantia brokerage house operations, the 3rd biggest in Brazil, on the Sao Paulo Commodities & Futures Exchange
- Supported technical proposals for the Sales & Marketing Department in structured products for clients such as Siemens, Ford, GM, Brahma, ABB and Gessy-Lever
- Supervised three employees in the settlement of the operations of the Garantia brokerhouse

Analyst, Economic Research Department

May 96 – Apr 97

- Developed studies for forecasting the Gross Domestic Product, industrial production, and Brazilian inflation
- Wrote daily product report for clients regarding economic and political news, and market expectations
- Planned and designed a database for studies of Latin American and United States economic variables

**MCM ASSOCIATE ECONOMIC CONSULTING**, São Paulo, Brazil

Analyst, Department of Capital Markets

Mar 95 – Apr 96

- Advised clients with regard to financial markets, capital markets, political and economic indicators
- Advised and assisted clients of the Foreign Exchange-MCM product
- Researched and prepared materials for partners for economic presentation to clients

### ADDITIONAL INFORMATION

- Fluent in Spanish, Italian, Hebrew and English. Portuguese native speaker
- Extensive travels around the world, including living more than 1 year in an Israeli Kibbutz (1990), all Latin America, Europe, Egypt, and all Southeast Asia. Retraced the Inca Trail to Machu Pichu
- Hobbies: guitar, theater, sky-diving, and scuba-diving

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## **EDUCATION**

### **THE WHARTON SCHOOL, University of Pennsylvania**

Philadelphia, PA

*Master of Business Administration Candidate*

May 2001

- Major in Operations and Information Management.
- Co-chair, Wharton Entrepreneurship Conference 2000. Graduate Associate, Hill College House. Member, Entrepreneurship Club and Consulting Club.

### **Harvard University**

Cambridge, MA

*AB magna cum laude in English and American Literature and Language*

June 1996

- Employment: Harvard Student Agencies/ Let's Go Travel Assistant Manager, 15+ hours/week.
- Community service: Producer of CityStep dance benefit, Co-chair of Service Mentor Program (Phillips Brooks House).

## **EXPERIENCE**

### **Bain & Company, Inc.**

Boston, MA

*Summer Associate*

Summer 2000

### **Post-Merger Integration**

- Identified and evaluated cost savings opportunities in the telemarketing division of a major children's book publisher.
- Structured action plan to realize \$1.9 MM of cost synergies identified following acquisition.
- Analyzed potential opportunities for expansion and managed client process of realizing merger goals.

### **EF Institute for Cultural Exchange/ EF Educational Tours**

Cambridge, MA

*Customer Relations Manager*

1998-1999

*Educational Tour Consultant*

1996-1998

### **Project Management**

- Founded and implemented a department designed to address customer concerns strategically, establish customer satisfaction metrics for sales representatives, and manage customer complaints electronically company-wide.
- Set departmental goals, structured budget of \$200,000, and managed Customer Relations staff.

### **Leadership and Initiative**

- Led team of in-house computer programmers to develop complaint management intranet site with accompanying database and document archival. System produced a 34% turnaround in dissatisfied customer retention rate and 50% reduction in customer complaint response time.
- Team leader for EF Global Citizen Scholarship, managed scholarship program for 13 students from the U.S. and Canada.
- Served as senior team member 1997-1998, sharing responsibility for training new employees, scheduling of shifts, identifying opportunities to improve performance, and leading weekly meetings.

### **Analysis and Training**

- Analyzed customer feedback to improve quality of customer service and educational tour programs. Designed and conducted a survey of 200+ loyalty program members.
- Trained 100+ sales and customer service representatives in North America to implement new customer satisfaction system.
- Selected to devise and deliver motivational sales strategy training to Dallas, Texas employees in 1997.

### **Sales and Marketing**

- Selected for 1998 Early Sales team (Feb.-Aug. 1997). Recruited more groups than any salesperson in the United States and led regional team to 28% increase in sales over previous season.
- Honored as "Rookie of the Year," as the new employee who made the greatest contribution to company goals.
- Promoted international travel to educators in Kentucky, West Virginia, Ohio, Indiana, and Michigan. Marketed tour packages by telephone and supervised stateside handling of tour departure for over 130 teachers and 2000 participants.

## **ADDITIONAL INFORMATION**

- Interests include travel, theatre, and the ongoing trials and tribulations of the Boston Red Sox.

## MEHMETBUDAK

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### EDUCATION

#### THEWHARTONSCHOOL,UniversityofPennsylvania

Philadelphia,PA

*MasterofBusinessAdministrationCandidate* –DualmajorsinFinanceandStrategicManagement

May2001

- MemberofFinanceClub,M&AClub,andPrivateEquityClub
- StudentLiaisonotheDirectorofFinancialInstitutionsResearchCenter

#### UNITEDSTATESNAVALPOSTGRADUATESCHOOL

Monterey,CA

*ResearchScholarshipinAerospace Engineering* GPA3.9/4.0

1998-1999

#### GAZIUNIVERSITYINSTITUTEOFSCIENCEANDTECHNOLOGY

Ankara,TURKEY

*MasterofScienceinIndustrialEngineering*

1996-1998

Completeddegreerequirementsbyattendingnightclassesandwrothethesis *RestructuringofTurkish AerospaceIndustry*

#### UNITEDSTATESMILITARYACADEMY

WestPoint,NY

*BachelorofScienceinMathematicalEconomicswithDistinction(top5%)* GPA3.7/4.0

1991-1995

- RhodesScholarNominee,PresidentofOperationsResearchClub,PhiKappaPhiandPiMuEpsilon
- Oneoftenstudentsselectedfrom80countriesworldwidetoattendWestPointClassof1995

HonorSocieties

### EXPERIENCE

#### GOLDMAN,SACHS&CO.

NewYork,NY

*SummerAssociate,InvestmentBankingDivision*

May2000 -August2000

- Activelyparticipatedinmerger andacquisition,equity,andfinancingtransactionsinCommunications,Media,Entertainment,HighTechnology,FinancialInstitutions,andEnergyandPowerGroups.
- Assistedinexecutionof\$260millioninitialpublicofferingforCrosswaveCommunications.A ssessedcompany valuation,authoredsalesmemorandum,andpreparedroadshowpresentation.
- Advisedinthesaleof\$200millionU.S.engineeringsoftwarecompany.Developedmergermodels,marketed transactiontopotentialstrategicbuyers,andpreparedfairnessopinionvaluationandboardpresentations.
- ParticipatedinXerox's\$500millionEurobondoffering.Authoredthesalesmemorandumandperformedcreditanalysis amongcomparablecompanies.
- PreparedthesalesmemorandumforCalpineCorporation's\$800millionU.S.secondaryoffering.
- AnalyzedmergercandidatesandvariousstrategicalternativesforalargeinstitutionalclientintheInsuranceSector.
- Preparedproposalfor\$400millionU.S.secondaryofferingofamajorMexicanbank.
- Performedfinancialanalysisincludingdiscountedcashflow,accretion/dilution,andcomparabletransactions.

#### OFFICEOFSECRETARYOFDEFENSE,GovernmentofTurkey

Ankara,TURKEY

*ProjectManager, AviationStrategyOffice*

1997-1998

- PerformedfinancialmodelingandDCFvaluation forlifecyclecostonanalysisof\$400million20 -yearprocurement projectand participatedin duediligencesessionswithseniormanagersofBoeingandUnitedTechnologies.
- Assistedinestablishingandmanaging *MilitaryAviationMagazine* inTurkey.
- Mostjuniorofficerindepartment'shistorytoholdthepositionofProjectManager.

*TestPilot&LogisticsOfficer*

1995-1997

- FlewU.N.humanitarianmissionstorefugeesettlementsinNorthernIraq insupportofNATOoperations.
- Supervised39personnelandmanage equipmentinexcessof\$14million.

### PERSONAL

- MeritoriousServiceMedal(jobperformance);ArmyCommendationMedal(flightoperationsinNorthernIraq)
- Ranked#1among96pilotsin1998
- Authoredandpresented *ConstructionofEfficientFrontierforBankLoans* at1995OperationsResearchConference
- Enjoybasketball,golf,flying(bothfixandrotarywing),strengthtraining, go karting, politics, andcommunityservice

**VINEET BUDHRAJA**  
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## EDUCATION

**The Wharton School, University of Pennsylvania, Philadelphia, PA**  
Master of Business Administration Candidate, Finance and Entrepreneurship. May 2001  
Consultant at SolC. Snider Entrepreneurial Center.  
Teaching assistant for Speculative Markets and Fixed Income Securities.  
Wrote business plan for venture based on oxygen measurement technology.  
Bachelor of Science in Economics, Finance Concentration, Summa Cum Laude. May 2000

**The School of Engineering and Applied Science, University of Pennsylvania, Philadelphia, PA**  
Bachelor of Science in Systems Engineering, Summa Cum Laude. May 2000

*Undergraduate Honors:* Udayagiri Award for merit and scholarship in business and engineering, Wolf Award for Systems Engineering senior with best academic record, Dean's List for 96 –99.  
*Cumulative Undergraduate GPA:* 3.98/4.00

## EXPERIENCE

**McKinsey & Company, New York, NY** June – August 2000  
*Summer Associate*

- Worked with insurance company client to establish internet financial services joint venture. Venture will offer insurance products, online payment, and online financing to B2B exchanges.
- Created terms sheet for joint venture. Built revenue model to determine royalties paid to each parent company and required cash contributions from each parent company. Terms sheet and model used to negotiate equity distribution among partners.
- Evaluated options for providing online payment. Met with potential bank partners and analyzed their online payment offerings. Convinced client to use small technology company for payment instead of a bank. Negotiations with technology company are currently underway.

**Donaldson, Lufkin & Jenrette, New York, NY** May – July 1999  
*Summer Analyst, Investment Banking Technology Group*

- Created comparable company analysis to determine valuation of \$65M internet IPO. Analyzed competition based on management team, strategic partnerships and client base.
- Developed taxonomy of e-commerce companies detailing each company's financing history, management, and financial performance. Taxonomy used to target potential DLJ clients.
- Calculated valuation metrics for Electronic Manufacturing Services companies, and used results to create new business presentations.

**PricewaterhouseCoopers, San Francisco, CA** June – August 1998  
*Summer Analyst, Financial Advisory Services Group*

- Performed financial analysis of bankrupt company under FDIC investigation. Summarized results in reports submitted to FDIC.
- Assisted in creating a holding company for an electric utility. Researched holding company structures and relevant regulatory issues, and presented findings to upper management.

**Jet Propulsion Laboratory, Pasadena, CA** May – August 1997  
*IT Consultant*

- Co-designed prototype information system for Mars Microprobe project. Interviewed project team to obtain system requirements.
- Created program in Excel that analyzes budget and schedule information, tracks upcoming events and project concerns, and graphs analyses.
- Presented program to project team, program manager and NASA headquarters personnel.

## ADDITIONAL INFORMATION

Experienced in Excel, Word, PowerPoint, Visual Basic, C, and Matlab. Enjoy tennis, basketball and skiing. Proficient in Russian.

**JOHNS.BURKHART**  
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## EDUCATION

**THE WHARTON SCHOOL, University of Pennsylvania** Philadelphia, PA  
Master of Business Administration Candidate, GMAT: 760 May, 2001  
Majors in Finance and Managing Electronic Commerce  

- Director's Honor List Fall 1999 & Spring 2000, First -Year Honors, Cohort Classroom Contribution Award
- Captain Wharton Rowing Team, Director of Operations Wharton Technology Conference, Wharton Welcome Weekend Committee Chair, Career Management Technology Task Force, Academic Quality Circle Representative

**HARVARD UNIVERSITY** Cambridge, MA  
B.A. cum laude in Mechanical and Materials Engineering June, 1995  

- Oarsmen on 1995 National Championship Harvard Varsity Lightweight Crew. Selected First Team All Ivy League. Represented Harvard at the 1996 World University Rowing Championship, Taiwan.

## EXPERIENCE

**DIAMOND TECHNOLOGY PARTNERS** Chicago, IL  
*Summer Associate* May 2000 - August 2000  

- Member of six person team that developed the digital strategy for two business units representing \$1.2 billion in revenues for a \$7 billion dollar chemical and glass manufacturing company. Individual responsibilities included analyzing the competitive landscape, creating new business venture proposals, and interviewing client management. Team was awarded further opportunity to develop business and technology infrastructure plans for the venture proposals created in the initial strategy phase.

**GENERAL MOTORS CORPORATION** Detroit, MI  
**Worldwide Purchasing**

*Senior Warranty Reduction Engineer* April 1998 - August 1999  

- Led four person team in pilot effort of North American Operations warranty reduction program; a joint effort with a key GM supplier responsible for reducing an annual warranty expenditure. Project received 2000 Lean Engineering Recognition Award.
- Utilized statistical problem solving methodology to discover the root cause of primary warranty costs and implement corrective actions; improvements decreased warranty charges by over 20%.
- Developed procedures used by subsequent teams focusing on warranty cost reduction.

*Supplier Development Engineer* March 1997 - April 1998  

- Resolved capacity issues and defrayed price increases by facilitating the transition of supplier processes to lean manufacturing principles.
- Performed cost studies to investigate the validity of supplier quote structures and recommend prices to GM purchasing agents, generated savings in excess of \$3 million.
- Placed on special assignment with North American Operations Logistics Group, focusing on the railroad industry. Improved lead -time and throughput of vehicle delivery over rail, from assembly plant to dealer distribution centers.

*Associate Supplier Quality Engineer* September 1995 - March 1997  

- Managed relationships with suppliers to ensure the ability of processes to manufacture parts within engineering specifications at the demand rate.
- Visited supplier manufacturing sites to perform quality audits, approve processes for shipment of material to GM assembly plants, and prove quoted capacity.
- Lead Supplier Quality Engineer for the GM de Mexico Right Hand Drive C/K Truck Program. Coordinated the efforts of thirty -five supplier quality engineers on an export adaptation of the Suburban and Tahoe built in Silao, Mexico. Program awarded 1997 President's Council Honors for Outstanding Teamwork and Achievement.

## ADDITIONAL INFORMATION

**Service:** Interviewer for Harvard Admissions, Volunteer High School Assistant Crew Coach

**Interests:** Reading, Running, Wine Tasting, College Football

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## EDUCATION

**THE WHARTON SCHOOL, University of Pennsylvania** Philadelphia, PA  
**MBA Candidate, Finance** May 2001  
Co-Producer, The Wharton Follies (25<sup>th</sup> Anniversary); Media & Entertainment Club; Elected Cohort Alumni Representative;  
Finance Club.

**HARVARD UNIVERSITY** Cambridge, MA  
**BA, Economics** June 1993  
Associate Design Editor, *The Harvard Crimson*; Business Editor, *The Harvard Crimson*; Treasurer, The Fox Club; Business  
Manager, African American Cultural Center.

## EXPERIENCE

**CHASE SECURITIES, INC.** New York, NY; Los Angeles, CA  
**Summer Associate** May-August 2000

- Worked in Global Syndicated Finance in New York and Entertainment Industries Group in Los Angeles on syndicated loan transactions, including a \$5 -6 billion acquisition financing for a Latin American manufacturing company, a \$200 million bank facility for a large film production company, and a \$400 million transaction for an entertainment startup.
- Negotiated deals with clients and advised syndicate banks on loan agreements and client business strategy.
- Conducted statistical analysis on film performance to test client financial assumptions and projections.

**FREELANCE CONSULTANT** Cambridge, MA; Los Angeles, CA  
May 1998 - February 2000

- Advised clients on business opportunities in entertainment, technology, and retail industries.
- Wrote business plan and built financial model used to approach investors for a \$50 million retail apparel venture on behalf of Stax Research, Inc.
- Wrote business plan for a \$20 million Internet entertainment company.

**TURNER NETWORK TELEVISION (TNT)** Los Angeles, CA  
**Assistant to Vice President of Original Programming** September 1998 - May 1999

- Wrote script analysis and story notes on materials submitted to TNT and on television films and series in development.
- Hired writers and directors for television films.

**MONITOR COMPANY** Cambridge, MA  
**Management Consultant, Team Leader** June 1993 - May 1998

- Built complex financial models that enabled clients to make informed strategic decisions and evaluate the potential impact of those decisions on company valuation.
- Evaluated new business opportunities and wrote business plans for interactive entertainment and gaming clients.
- Managed consulting teams of 5 -10 consultants and clients responsible for revamping sales and marketing strategies for insurance and financial services clients.
- Led five -person team that identified 10 potential strategic partnerships for a global satellite communications company.
- Created and led diversity recruiting strategy for Monitor Company resulting in the hiring of over 20 new consultants.

**PLIMPTON & COMPANY** Princeton, NJ  
**Venture Capital Associate** Summer 1992

- Screened business plans and investment proposals for early -stage growth companies.
- Expanded business at portfolio companies by identifying joint venture opportunities in Japan.

## ADDITIONAL INFORMATION

- Avid filmgoer and television enthusiast.
- Other interests include gourmet food, tennis, basketball, and scuba diving.

**STEPHEN B. CAINE**  
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## EDUCATION

- THE WHARTON SCHOOL, University of Pennsylvania** Philadelphia, PA  
Master of Business Administration Candidate, Finance and Entrepreneurial Management. May 2001
- Activities: Consulting Club, Finance Club, Real Estate Club.
- UNIVERSITY OF UTAH** Salt Lake City, UT  
Honors Bachelor of Arts Degree, Political Science, *cum laude*, Minor in German. June 1995
- Honors at Entrance Scholarship, four-year full-tuition academic scholarship.
  - Honors: Phi Beta Kappa, Phi Kappa Phi, Dean's List.
- CENTER FOR NEAREAST ERNSTUDIES, Brigham Young University** Jerusalem, Israel  
Fall 1993
- Studied the Jewish, Islamic, and Christian religions, cultures, and politics.

## EXPERIENCE

- A. T. KEARNEY** Washington, DC  
*Summer Associate* Summer 2000
- Worked directly with a Vice President to design a management information system for a leading global investment bank to measure the performance of 17 functional areas representing more than \$2 billion in annual spending. Also managed the communication of the team's work to the client.
  - Analyzed the video production department within a major U.S. pharmaceutical company as part of a larger marketing effectiveness initiative. Uncovered capacity constraints, unproductive vendor relationships, and ineffective use of industry expertise. Recommended specific actions to save \$1 million annually.
- THE BOYER COMPANY** Salt Lake City, UT  
*Special Projects Director, Commercial Real Estate Development* 1997-1999
- Coordinated the \$300 million redevelopment of a 40-acre rail yard and historic train station in downtown Salt Lake City, under the direction of the Chairman of the Company.
  - Involved in all strategic financial, leasing, marketing and architectural design decisions and designed all financial analyses for the project.
  - Directed all public relations for the development, including frequent interaction with the media.
  - Represented the Company throughout the entitlement process with the City Council and all other relevant political and community bodies. Involved in negotiating over \$18 million in tax increment financing.
  - Developed the initial marketing strategy and supervised the design of all retail marketing materials.
- Financial Analyst* 1995-1997
- Prepared a \$500 million offering memorandum to sell 146 office and medical office properties in the REIT market with a team from Morgan Stanley.
  - Worked as a member of a small finance team responsible for securing over \$100 million annually to finance all new and existing projects.

## OTHER EXPERIENCE

- The Supreme Court of the United States:** *Administrative Intern, Washington, DC*. Liaison between the Court and guests of the Justices, foreign dignitaries and the public. Presented 20-minute lecture daily in the Courtroom. Spring 1994.
- Volunteer Service:** *Düsseldorf, Germany, The Church of Jesus Christ of Latter-day Saints*. Developed extensive language and cultural skills through two-year immersion into German society. 1990-1992.

## ADDITIONAL

- Language:** Fluent in German.
- Volunteer:** Developed, directed and secured funding for a \$40,000 inner-city elementary school playground beautification project. Taught singing and music appreciation weekly to two 5th grade classes. (1995-1997)
- Other Interests:** Studied the piano, sang with a professional choir for several years, traveled extensively throughout Europe and the Middle East, and enjoy the outdoors, rowing, downhill skiing, swimming, NPR and a good newspaper.

**GREGORY D. CANZANO**  
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## EDUCATION

**THE WHARTON SCHOOL**, University of Pennsylvania Philadelphia, PA  
**M.B.A Candidate in Finance** May 2001  
Consulting Club, Finance Club, Quality Circle Rep, Wharton Welcome Weekend Chair, Admissions,  
Into the Streets, Christmas in April

**GEORGETOWN UNIVERSITY**, School of Foreign Service Washington, DC  
**B.S. International Economics**, *Magna Cum Laude* May 1995  
GPA 3.7/4.0; Dean's List every semester  
4.0 GPA in Finance Classes (one class short of Finance major in GUB -School)

## EXPERIENCE

**BERATER (CONSULTANT) TO INNOVATION CAMPUS** Wolfsburg, Germany  
Newly formed Incubator/Venture Capital subsidiary of Volkswagen AG August 2000 - September 2000

- Developed and delivered a 2-hour presentation in Germantown to the entire IC team on valuation methods
- Advised Director on improvements to current organization structures, methods and processes
- Developed a due-diligence process list for IC to use in its evaluation process
- Advised on interaction with entrepreneurs, VCs and Angels
- Aided entrepreneurs with business plans and presentations in preparation for meetings with potential investors

**WASSERSTEIN PERELLA & CO** New York, NY  
Mergers & Acquisitions Investment Banking, *Summer Associate* June 2000 - August 2000

- Completed a rapid merger of equals from inception to public announcement as member of a small, dedicated team
- Performed comparable companies valuations, comparable acquisitions valuations, and DCF valuations
- Organized and aided in producing fairness opinion books and presentations to the Board of Directors including detailed company profiles, strategic positioning, merger consequences, accretion/dilution analysis, acquisition sensitivity analysis, share repurchase or cash election and exchange ratio analysis
- Researched and recommended most pertinent acquisition method for client with regard to accounting treatment

**FIRST UNION SECURITIES** Richmond, VA  
Technology Investment Banking, *Summer Associate* May 2000 - June 2000

- Edited offering memorandum for lead managed IPO over the course of several due diligence meetings
- Reviewed business plans, identified top candidates and followed-up with entrepreneurs to ascertain quality
- Determined a universe of comparable companies and performed valuation analysis
- Identified potential IPO candidates through researching companies in VC portfolios

**LEGG MASON WOODWALKER, INC.** Baltimore, MD  
Debt Finance Group, *Associate Vice President* July 1995 - May 1999

- Executed quantitative analysis for first synthetic advance refunding in the state of Texas
- Saved client over \$80,000 during a bond issue pricing, working with derivative providers and legal counsel
- Utilized derivatives including forward purchase contracts, caps, collars, and swaps
- Organized and executed Legg Mason's first derivative product auction
- Achieved unprecedented two-tiered promotion during a period of restructuring and layoffs in department

## ADDITIONAL INFORMATION

Investing, Stocks, Fitness, Petson Wheels, Travel and Languages  
Spent 6 months self-studying German, improving from low proficiency (3 years collegiate study) to a capacity for successful interaction within a business environment

**JAIME E. CARVALLO**  
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### EDUCATION

**THE WHARTON SCHOOL, University of Pennsylvania** Philadelphia, PA  
**Master of Business Administration Candidate, Strategic Management and Marketing** May 2001

- President, Retail Club; member of the Wharton Latin America Student Association and the European Club.
- Co-organizer, Consulting Mania and Resumania – Consulting Club
- Coordinator, Marketing Match – Marketing Club

**UNIVERSIDAD DE LIMA** Lima, Peru  
**Bachelor of Business Administration** December 1994

- Elected to the University Assembly (1992-1993) and the University Council (1993-1994), Universidad de Lima's top student government institutions. GPA: 4.0 out of 4.0.

### EXPERIENCE

**DIAGEO plc [United Distillers and Vintners]** London, UK  
**Summer Associate – Brand Innovation Group** Summer 2000

- Developed cash flow model to assess profitability of new product launches. Model is currently being used to verify £100 million estimate in incremental profits from worldwide launches of new “Ready-to-Drink” (RTD) category.
- Led ideation sessions with cross-functional team members from UDV Italy, Spain and UK to identify new RTD category's key economic drivers and value creation opportunities.
- Researched consumer purchasing trends in beer and RTD categories, including price points, packaging, distribution channels, etc. Results currently being used to develop new trade strategy.
- Conducted competitive analysis and estimated size of the profit pool for 13 key beer and RTD markets.
- Developed generic framework to analyze new product development and pricing strategies. Initiated framework's implementation in UDV Italy.

**BANCO DE CREDITO DEL PERU** Lima, Peru  
**Senior Risk Analyst – Risk Analysis Area, Credits Division** 1998-1999

#### *Strategic Planning and Project Management*

- Led ten-person team that revamped credit application procedures and created the Risk Analysis Area. Secured reduction of bank's portfolio of past due loans by US\$5 million in first year, improved collateral quality and value, and approved safer loans. Working methodology adopted by bank's affiliates in Colombia, El Salvador and Bolivia.
- Assessed short- and long-term loan applications by small and medium size businesses. Presented and recommended credit proposals to senior management.
- Organized roundtables to train new analysts and to evaluate performance of new Risk Analysis Area by identifying and resolving bottlenecks.
- Designed standardized loan evaluation process and risk-perception software, reducing credit approval time by 60%.
- Developed and implemented a nationwide training program which facilitated a smooth transition to new credit application procedures.

**Credit Officer – Commercial Banking, Corporate Banking Division** 1995-1998

#### *Finance and Business Analysis*

- Managed a US\$250 million portfolio of loans to the largest import/export, paper manufacturing, construction, consumer products and fishing firms in Peru.
- Conducted ongoing short- and mid-term analyses of clients' financial positions and recommended credit proposals to Credit Committee. Generated US\$100 million of new loans in 1998, exceeding annual budget by 120%.

#### *Leadership Skills*

- Led research team that prepared in-depth analysis of potential banking options in Central America, as part of Banco de Credito's global expansion strategy. Presented a justification for setting up a bank in El Salvador.
- Organized the massive retail sale of 44 million shares for Peru's largest engineering services and construction activities group in Peru.

#### *Presentation Skills*

- Presented new business opportunities to prospective customers, generating US\$60 million in new loans.
- Developed a high-impact presentation targeted to attract prospective international customers in the Peruvian market; expanded the number of portfolio customers by 25% in a two-year period.

### ADDITIONAL INFORMATION

- Native Spanish speaker, fluent in English, and knowledge of Portuguese. Peruvian and European Community citizen.
- Passion for antique collecting and Peruvian colonial art. Enjoy dancing, traveling, swimming and volleyball.

**ALLISONS.CATALANO**  
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## EDUCATION

### THE WHARTON SCHOOL, University of Pennsylvania

Philadelphia, PA

Master of Business Administration Candidate, Concentration in Strategic Management

May 2001

- First Year Academic Honors and First Semester Director's List
- Organized first ever personal organizer booth for Fall 2000 Brand Bash; founded Colorado Trek
- Active member of Technology Club and Consulting Club

### BRYNMAWR COLLEGE

Bryn Mawr, PA

Bachelor of Arts, Magna Cum Laude (3.79 GPA)

May 1993

- Graduated With Honors in Environmental Science
- Awarded Naval Reserve Officers Training Corps 4 -year academic scholarship; NROTC Distinguished Graduate
- Junior Year Abroad: Sydney, Australia

## EXPERIENCE

### BAIN & COMPANY, INC.

London, England

Summer Associate

Summer 2000

- Designed customer relationship management process for a major entertainment company's website launch; presented recommendation to client's Managing Director.
- Screened over 30 business plans from European entrepreneurs; performed due diligence on a promising plan that resulted in a positive investment decision.
- Conducted extensive competitor analysis for a major tavern chain, resulting in solid foundation for post-merger integration work.

### UNITED STATES NAVY

Yokosuka, Japan; Athens, GA; Whidbey Island, WA; San Diego, CA

Lieutenant, Supply Corps

1993-1999

#### Leadership and Management

- Led 120 -person division that provided food and hotel services to a crew of 1200. Recognized for exceptional management by scoring highest grade in the region among 12 participant on Navy -wide logistics inspection.
- Managed \$14 million spare parts budget and \$18 million spare parts warehouse in support of 40 hovercraft; selected to perform this job which is normally reserved for an officer with 5 more years of experience.
- Personally supervised \$3 million cash for payroll and ATM's; reduced volume of returned checks by 23%.
- Managed two retail outlets; led 5 -person team that devised strategies to reduce slow moving merchandise which subsequently increased profits by 30%.

#### Analysis and Problem -solving

- Analyzed food inventory processes and devised new management strategies that increased inventory accuracy from 47% to 100% in 5 months.
- Devised, planned, and executed the \$1.2 million renovation of a 200 -room lodging facility.
- Authored and administered \$2 million budget plan for 200 -room lodging facility operation and maintenance.
- Researched and resolved \$300,000 of inventory discrepancies and thereafter maintained 100% inventory accuracy of critical aviation components.
- Isolated computerized usage data for high volume, time sensitive aviation components and adjusted inventory to meet demand, reducing out -of-stocks situations by 12%.

#### Awards and Accomplishments

- Graduated 1<sup>st</sup> of 96 from six -month US Navy Supply Corps School.
- First Supply Officer ever on USS Blue Ridge to attain professional designation as a ship -based supply expert.
- One of the most junior officers in the Supply Corps to earn both aviation and ship -based professional designations.
- Awarded two Navy Commendation Medals and one Navy Achievement Medal for exceptional performance.

## ADDITIONAL INFORMATION

- Extensive experience living and working abroad
- Instituted and led tutoring program with local elementary school
- Hobbies include international travel, hiking, fly fishing, handbells, cooking
- Ran Marine Corps Marathon

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## EDUCATION

**THE WHARTON SCHOOL, University of Pennsylvania** Philadelphia, Pennsylvania  
*MBA Candidate* May 2001

- Leadership: President, Motorsports Club, Co -Lead Coordinator of Boston Technology Trek, Co -Chair of Internet Group, Technology Club
- Teamwork: Represented Wharton in Hummer Winblad Venture Partners February Madness Startup Tournament (reached Final 4), Dell Case Competition (winning team at Wharton), Wharton Business Plan Competition (Semifinalist)
- Member of Technology, E -Commerce, E -Club, Private Equity clubs

**POMONA COLLEGE** Claremont, California  
*Bachelor of Arts, Economics* May 1995

## EXPERIENCE

**NETCONVERSIONS, INC.** Philadelphia, Pennsylvania  
*Co-Founder* December 1999 to August 2000

- Started company as an ASP solution to help e-commerce firms increase conversion rates of visitors into buyers by utilizing proprietary behavioral modeling research developed at The Wharton School to better understand visitor data and using marketing messages and an integrated marketing platform to better target and convert the visitors
- Wrote business plan, created presentations, and met with investors that resulted in over \$1 million in financing
- Negotiated partnerships, secured paying customers, and hired employees
- Worked with legal counsel to incorporate, set up option plans and negotiate financing documents

**SALOMON SMITH BARNEY INC.** Los Angeles, California  
*Investment Banking Financial Analyst* May 1997 to July 1999

- Created financial models for mergers and acquisitions including pro forma combination analyses, accretion/dilution, leveraged buyout analyses, and valuation
- Created confidential offering memorandums, and presentations to management and Boards of Directors
- Led due diligence visits and participated in negotiating confidentiality agreements and purchase contracts
- Participated in mergers and acquisitions ranging from \$50 million to \$8 billion in transaction value
- Participated in several lead and co-managed equity and debt offerings: including drafting SEC documents, creating roadshow presentations, and coordinating and leading clients on roadshow visits
- Led junior professional involvement in analyst recruiting in the Los Angeles office

**ERNST & YOUNG LLP** Los Angeles, California  
*Financial Analyst - Financial Advisory Services* June 1995 to April 1997

- Member of National Purchased Research & Development Teams specializing in the valuation of intangible assets, relating to software technology acquisitions
- Executed engagements relating to valuation of start-up or venture capital stage companies; gifting and estate taxes; and intangible assets (i.e. technology, film library, patent rights)
- Performed financial statement analysis, financial modeling, industry research, and client interviews pertaining to valuation of publicly traded and privately held companies
- Built Discounted Cash Flow, Market Multiple, and Similar Transactions valuation models

## ADDITIONAL INFORMATION

Languages: Spanish (conversation and written), Mandarin Chinese (conversational)  
Interests: Golf, Tennis, Soccer, Snowboarding, Auto Racing

**JENNIE.CHANG**  
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## EDUCATION

**THE WHARTON SCHOOL , University of Pennsylvania** Philadelphia, PA  
**Master of Business Administration Candidate, Marketing and Strategic Management** May 2001  
Co-chair, Wharton Technology, Media & Entertainment Conference; TA/Section Instructor, Marketing 101; Wharton Buddy;  
Member, Consulting and Technology Clubs

**STANFORD UNIVERSITY** Stanford, CA  
**Bachelor of Arts, English** March 1993  
Ecole Supérieure de Commerce de Paris (exchange student, Fall 1991) (Paris, France)  
Director, Asian American Student Association; L'il Sib/Big Sib Program; Academic Advisor; Proof reader, *Stanford Daily*

## EXPERIENCE

**MERCER MANAGEMENT CONSULTING** San Francisco, CA  
**Summer Associate** Summer 2000

Developed brand strategy for leading online brokerage firm expanding beyond web-based retail business.  
• Created brand architecture map, evaluated website, assessed customer experience, and assisted in interviews of senior executives.  
• Collected and analyzed company, analyst, press, and customer data; created slides for interim and final presentations.  
• Contributed to final recommendations regarding new brand architecture, decision rules, and implications.

**JENNIE.CHANG** San Francisco, CA  
**Independent Consultant** 1999  
• Devised marketing strategies for BEA Systems and Network Appliance, including tradeshow and competitor response activities.

**SYBASE, INC.** Emeryville, CA  
**Marketing Programs Manager (promoted via transfer from public relations)** 1998  
**Senior Specialist** 1997 - 1998

### *Leadership and Management*

- Led cross-departmental projects, including customer relations, strategic announcements, and product reviews.
- Managed agency team of six people with a budget of over \$75,000/month; oversaw marketing budget of \$120,000/year.
- Coordinated and executed programs with company executives.

### *Marketing*

- Researched, analyzed, and evaluated marketing programs, including collateral, website, tradeshow, and direct mail.
- Created direct email campaign, including list development and website integration.
- Built and maintained relationships with business and trade press to secure interviews, coverage, and influence.
- Developed, managed, and executed key marketing events at JavaOne and the Powersoft User Conference.

**PHASE TWO STRATEGIES** San Francisco, CA  
**Account Manager (promoted from account associate in one year)** 1995 - 1997

### *Leadership and Management*

- Led three account teams with total budget of over \$70,000/month; supervised two account coordinators, and managed client relationships at executive level.
- Created and led new business presentations to firm's prospective clients.

### *Marketing*

- Formulated new product introduction strategies for Information Advantage, Forté Software, and TIBCO.
- Conducted corporate and product surveys to analyze marketing strategy; interviewed analysts, customers, and partners.
- Created new positioning for TIBCO and developed marketing program for Inference's knowledge management initiative.

**WILSON MCHENRY COMPANY** San Mateo, CA  
**Account Executive (promoted from account coordinator in one year)** 1994 - 1995

- Conducted and analyzed communications surveys. Executed media relations campaigns for Symantec and Intuit.

## ADDITIONAL INFORMATION

Former SF chapter IABC board member and Stanford Young Alumni Club officer. Proficient in French, and knowledge of Italian and Korean. Interests include travel, food, and pop culture. Avid Francophile. Interned at marketing communications firm in 1993.

**SAMUEL CHASIA**  
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## EDUCATION

**THE WHARTON SCHOOL, University of Pennsylvania** Philadelphia, PA  
**Master of Business Administration Candidate** May 2001

- Majors: Real Estate and Finance.
- Activities: Real Estate Club, Finance Club, Wharton African Students' Association.
- Academic Honors: Martin Backsbaum Memorial Fellowship recipient, Winner, Seevak Real Estate Research Competition.

**UNIVERSITY OF OREGON** Eugene, OR  
**Bachelor of Architecture, Cum Laude** GPA: 3.85/4.0 June 1997

- Major: Architecture, Minor: Economics.
- Activities: African Student's Association Director, International Cultural Exchange Program.
- Academic Honors: Golden Key National Honor Society, Mortar Board Junior Scholar, Dean's List, Dean's Scholar 1993.
- Architectural honors: Honorable mention, Little Bighorn Monument National Design Competition.

## EXPERIENCE

**GOLDMANSACHS GROUP, INC.** New York, NY  
**Summer Intern, Real Estate Investment Banking Division** 2000

- Worked on various deal teams providing investment banking services to Real Estate clients.
- Performed quantitative analysis for various merger transactions as well as for several CMB transactions.
- Prepared marketing material for a major real estate assets sale.

**RAR ARCHITECTS, INC.** Portland, OR  
**Intern Architect** 1999

- Managed the day-to-day activities of projects from the design stage through construction, often having to meet the demands of two or three projects simultaneously.
- Coordinated the activities of various external consultants who were an integral part of the project team.
- Prepared all construction documentation and blueprints used to get construction permits.
- Worked with local jurisdictions on behalf of the client to get project approval.

### Projects

- 60,000 SF, 3.6 million dollar senior housing project. Managed the project working closely with the developer, consultants and senior management from the design to the construction permit phase.
- 4 acre, 70 unit multifamily development. Prepared the design and construction documents as well as presentation drawings.

**CARLETON HART ARCHITECTS.** Portland, OR  
**Intern Architect** 1997 - 1998

- Worked as part of a team assisting the project manager in the day-to-day activities of projects
- Conducted building and zoning code research for various projects.
- Prepared presentation drawings for marketing purpose

### Projects

- 7000 SF, 560,000 dollar residential care facility. Involved in several redesigns and in the interior and exterior detailing of the facility.
- Renovation and expansion of a 23,000 SF manufacturing plant. Worked with the city to get building and zoning code compliance on this 80-year-old building.

## UDAYANCHATTOPADHYAY

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### EDUCATION

#### THE WHARTON SCHOOL, University of Pennsylvania

Philadelphia, PA

#### MBAC candidate –majoring in Entrepreneurial Management and Marketing

May 2001

- Thouron Scholar 1999 -2001 (full tuition)
- Director, Marketing and Public Relations, Wharton Business Plan Competition 2000
- Founder, EMANA (European MBA Association of North America), on line community including over 200 members
- Graduate Assistant, Wharton Career Management, responsible for counseling international student on US career issues

#### CAMBRIDGE UNIVERSITY

Cambridge, England

#### MA, BA (Honors), Economics

June 1995

- Sidney Sussex College Scholarship
- Elected vice-president, Cambridge India Society, 3<sup>rd</sup> largest student organization in Cambridge University
- Hockey player, Sidney Sussex College team, representing college in university wide tournaments

### EXPERIENCE

#### HIPPO INC.

New Haven, CT

#### Product Manager

May-August 2000

Manager of initial product launch and development team in Voice over Internet (VoIP) telecom start-up

- Managed corporate web-site design and building of financial model for investors; designed market research methodology
- Developed product scope; managed integration of corporate marketing and technical teams at implementation stage
- Identified potential alliances, conducted negotiations, and implemented concluded agreements with target companies
- Identified new market segments for product, resulting in revision of business plan and corporate strategy

#### KPMG MANAGEMENT CONSULTING

London, England

#### Information, Communications and Entertainment (ICE) practice

1996-99

#### Consultant

Strategy consultant specializing in internet, telecommunications and media convergence issues

Promoted to consultant a year earlier than average; responsible for project management and performance appraisals

- Served as acting director of marketing and business development for start-up telecommunications company on behalf of principal investor; co-wrote business plan, approached venture capitalists and managed initial phase recruitment
- Developed new pricing and marketing strategy for European wireless operator. Company subsequently rose to 2<sup>nd</sup> place in national market, with increase in stock value of 40% over implementation period
- Supervised successful license bid process and co-wrote business plans for African wireless operator seeking to launch in neighboring countries. Operator is now largest African regional cellular operator
- Designed market research methodology for satellite operator seeking to launch services in China; supervised nationwide research process and process of lobbying Chinese government for regulatory approval
- Made presentations at conferences (including GSM World Congress 1998) and regularly contributed to industry press

#### DATAMONITOR

London, England

#### Senior Business Analyst

1995-96

Economic analyst in consumer goods and media sectors

- Author of highest selling *Financial Times* media report, 1995-96, *Trends in UK Advertising*
- Managed development of Asia research capabilities, including field work in Philippines, Malaysia, Myanmar and Thailand

### ADDITIONAL INFORMATION

- Currently serving as board member on incubator targeting Cambridge University alum start-ups
- Business Mentor, Prince's Youth Business Trust (PYBT) (1996-99), to start-up supported by the trust in London
- English language teacher, Community Broking Service, London (1997-99); fluent Bengali, conversational French & Hindi
- Has lived and worked in North America, Europe, Africa, South East Asia and Indian sub-continent

**JOANNEQ.CHEN**  
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### EDUCATION

**THE WHARTON SCHOOL, University of Pennsylvania** Philadelphia, PA  
*MBA Candidate - Major in Finance*  
• Member of finance, private equity, technology clubs May 2001

**STANFORD UNIVERSITY** Palo Alto, CA  
*Master of Science in Electrical Engineering* - Concentration in VLSI design March, 1994

**UNIVERSITY OF CALIFORNIA, DAVIS** Davis, CA  
*Bachelor of Science in Electrical Engineering* June, 1992  
• Graduated with highest honors, top 1% of the class, UC Regents Scholarship (full tuition and stipend)  
• Member of Tau Beta Pi, Phi Kappa Phi, Pi Mu Epsilon honors societies

### EXPERIENCE

**GOLDMANSACHS (ASIA) L.L.C.** Hong Kong  
*Summer Associate, Investment Banking Division* Summer, 2000  
• *Merger/IPO Deal in Out - door Advertising.* Provided financial advisory to 2 Hong Kong companies on equity & secondary sales. Assisted in negotiating terms sheet and performed an AVP modeling to evaluate ownership structure. Worked with counsel to understand the exchange requirements at Hong Kong Main Board and GEM. Evaluated pros/cons of each for a successful IPO.  
• *Advisory on Investment in Asian Telecom.* Created a series of 4 pitch books to a European telecom company to explore investment opportunities in Asia. Performed extensive market analysis for the highly fragmented industry including 11 Asian countries and provided advisory on strategic options.  
• *Created a presentation to win the mandate* from a Taiwan semiconductor manufacturer on a \$500M ADR offering. Performed research and developed industry positioning.  
• *Advised a European client in consumer beverage acquisition strategy.* Researched the industry and the target company. Wrote memo to establish communications between the acquirer and target company executives. Performed common stock comparables & private transaction multiple analysis.

**INTEL CORPORATION** Santa Clara, CA  
*Summer Associate, Merger & Acquisition Group, Intel Capital* Summer, 2000  
• *Participated in 3 of Intel Capital's equity investment deals.* Conducted due diligence, evaluated companies' financial models and assumptions, built capitalization tables. Valued companies using discounted cash flow and comparable company multiples. Reviewed equity documents with counsels.  
• *Conducted financial reviews for 16 portfolio companies.* Wrote memo to raise red flag issues.

**INTEL CORPORATION** Santa Clara, CA  
*Senior Technical Marketing Engineer, Mobile & Handheld Products Group* 1994 - 1999  
• *Managed customer relationship* with major notebook PC manufacturers including IBM, Compaq, Dell, and NEC to launch Pentium II® processor and Pentium® III processor based notebook PCs. Received Intel Outstanding Customer Support Award  
• *Led an interdisciplinary team* of 10 to resolve issues which caused the production lines shut down at OEMs and threatened to delay the transition from Mobile Pentium® to Pentium II® processors.  
• *Created a web-based tool*, later integrated into corporate IT, to improve communication with the field sales.  
• *Managed and conducted training programs* including teaching, roadshows, and product positioning.

*Strategic Planner/Architect, Mobile & Handheld Products Group*  
• *Promoted a strategic new product* that allows OEMs to transition to a new generation processor faster.  
• *Created a PC build pipeline model* to evaluate the efficiency of existing laptop manufacturing process.

*Graduate Rotation Engineer, Graduate Rotation Program/Co-op Program* Santa Clara, CA/Shanghai, China  
• *Design Engineer.* Designed cache circuit of Pentium® III microprocessor.  
• *Marketing in Shanghai.* Promoted Intel initiatives, surveyed CAD market, coordinated a conference.

### ADDITIONAL INFORMATION

Fluent in written and spoken Chinese. Interests include hiking, scuba diving, travel, and Chinese Calligraphy.  
Elected to board of directors for Santa Clara Valley Science and Engineering Fair Association.

## YUET-PENG CHEONG

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### EDUCATION

#### The Wharton School, University of Pennsylvania Master of Business Administration Candidate

Philadelphia, PA  
May 2001

- Major in Finance and E-Commerce
- Marketing Committee, Entrepreneurship Conference, Asia Finance Conference
- Vice President, Toastmasters Club
- Member, Investment Management, Technology, E-Commerce Clubs

#### School of Engineering and Applied Sciences, University of Pennsylvania Master of Science in Computer Science

Philadelphia, PA  
May 1994

- Graduate Assistant, Computer Science Department
- Intern, Amiable Technologies, Philadelphia, PA (January-May 1994)

#### The University of Texas at Austin

#### Bachelor of Science in Mathematics with High Honors

December 1992

- College of Natural Sciences Scholar Awards for 1991 and 1992

### EXPERIENCE

#### MORGAN STANLEY DEAN WITTER

#### Summer Associate E-Commerce Group

New York, NY  
2000

- Evaluated strategic investment deals for MSDW Strategic Ventures, a \$100 million cross-over fund.
- Explored potential applications of auction technology within the firm and the financial services industry.
- Examined prospective business ideas and recommended implementation strategies to senior management.

#### ORACLE CORPORATION

Redwood Shores, CA  
1999

#### Development Manager Business Development Group

- Evaluated and advised on potential acquisition targets in Healthcare and Education application software industries, resulting in two product acquisitions.
- Designed a platform-independent solution for an older platform-specific applications system.
- Re-engineered the encumbrance model for Oracle Public Sector Financials (International), Version 12.

#### Project Manager International Public Sector Financials Group

1997-1999

#### Project Management and Product Development

- Supervised a team of four engineers in software design and development of Oracle Public Sector Financials.
- Identified product requirements with product managers and clients in UK, US and the Netherlands.

#### Process Improvement

- Pioneered and championed the creation of the GEHD Porting Group.
- Streamlined release processes and improved productivity and module reusability.

#### Staff Development

- Taught OPSFI classes and trained IT consultants, product analysts and support engineers.
- Co-designed and created product training manuals with product marketing group.

#### Senior Software Engineer Applications Technology Group

1994-1997

- Pioneered the conversion of Oracle Applications to Web-based applications.
- Coordinated division-wide product releases of 36 Oracle Applications.
- Owned and managed 25% of the product modules in Application Object Library.

### ADDITIONAL INFORMATION

- Advised and assisted 2 Internet startups on strategies, operations and implementations.
- Volunteer, Christmas in April, Oracle Promise.
- Interests include investing, gourmet cooking, good movies, and calligraphy.

1999

**JULIE CHEU**  
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cheuj@wharton.upenn.edu

## EDUCATION

**THE WHARTON SCHOOL, University of Pennsylvania** Philadelphia, PA  
**Master of Business Administration** in Finance and Marketing 1999 – 2001

- First Year Honors, Director's List 1999
- President NYCClub, Elected Cohort Social Chair, Wildmen Hockey, E-commerce Club

**NEW YORK UNIVERSITY** New York, NY  
**Bachelor of Science, Magna Cum Laude** (3.8) in Neural Science and Art History; Minor in French 1991 – 1995

- NYU Alumni Scholarship, National Merit Scholarship, NYU Founder's Day Award, Phi Beta Kappa

## EXPERIENCE

**MCKINSEY & COMPANY, INC** Stamford, CT  
**Summer Associate** Summer 2000

*Constructed philanthropic strategy for merging media giant and major Internet service provider*

- Evaluated philanthropic needs, history and strategy for each company
- Developed post-merger philanthropy strategy and outlined steps to rationalize \$35 million budget
- Presented findings to client during intermediary and final review meetings

*Defined the wireless strategy for newly merged national telecommunications giant*

- Analyzed distribution of \$1.5 billion in private equity funding in telecommunications
- Recommended a wireless strategy based on these findings and the strategies of competitors

**ANDERSEN CONSULTING, LLP** New York, NY  
**Analyst, Process Competency Group** 1997 – 1999  
*Project Management and Leadership*

- Led seven-member team to create initiatives for reorganizing the New York office
- Managed personnel of major telecommunications client in creating accounting reports
- Solely responsible for successfully implementing and launching a global security prototype

*Analytical and Problem Solving Skills*

- Analyzed key performance measures at call center of a major international financial services firm
- Determined performance gaps impeding the completion of key projects at the call center
- Identified functional requirements of an accounts payable system through client interviews

*Client Management*

- Managed client system needs for project costing and asset management
- Facilitated client cross-organizational meetings after the system roll-out

**FREELANCE WRITER AND PHOTOGRAPHER** New York, NY  

- Photographed for major modeling agencies, managing teams of up to eight for each shoot
- Published interview profiles of famous photographers

1995 – 1997

**WHITEHOUSE, OFFICE OF SCIENCE AND TECHNOLOGY POLICY** Washington, D.C.  
**Intern, National Security and International Affairs Division** 1995

**UNITED NATIONS ENVIRONMENT PROGRAM** Paris, France  
**Computer Consultant** 1994

## ADDITIONAL INFORMATION

**Languages:** Fluent in French; Intermediate German and Japanese

**Volunteer:** Habitat for Humanity, Women in Need, Regent Family Shelter

**Interests:** Travel - 22 countries on 5 continents, biking, hiking, canoeing, ballroom dancing, art - creating and viewing

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## EDUCATION

**THE WHARTON SCHOOL, University of Pennsylvania** **Philadelphia, PA**  
**Master of Business Administration Candidate** **May 2001**  
Majoring in Finance and Entrepreneurial Management  
1999 1<sup>st</sup> Place Winner, Clorox Marketing Competition;  
2000 Silver Prize Winner, Wharton Business Plan Competition; Finalist Bain Business Plan Competition

**HARVARD UNIVERSITY** **Cambridge, MA**  
A.B. East Asian Studies and Economics *cum laude* **June 1992**  
Wiley Scholar for Achievement, Dean's List

## EXPERIENCE

**ALIGO INC.** **San Francisco, CA**  
**Senior Manager, Business Development** **Summer 2000**

- Created financial model for Aligo, a wireless Internet software infrastructure provider, to be used by senior executives as a strategic planning and fundraising tool
- Secured first two clients for showcasing technology including a B2B exchange and a large mobile workforce
- Evaluated and secured distribution licenses in agreements with several consulting firms to distribute software

**PT. SAMUEL SEKURITAS INDONESIA** **Jakarta, Indonesia**  
**Jr. Partner/Vice President, Corporate Finance** **1996 to 1999**

- Created Bond Trading Unit generating profits of over US\$3MM in 1998 despite adverse market conditions
- Lead relationship manager for Korean, Taiwanese, European, and U.S. merchant banks
- Managed trading desk of 4 traders and analysts
- Raised over US\$750MM in primary bonds syndications and derivatives for Indonesian companies
- First employee promoted to junior partner and receive profit sharing in business

**ROBERTSON STEPHENS & COMPANY** **San Francisco, CA**  
**Research Associate** **1995 to 1996**

- Covered 20 publicly listed companies in the healthcare industry for institutional clients
- Created and updated earning models and earning forecasts for managing director/general partner
- Prepared research briefs for institutional investors and sales force

**BSM PARTNERS** **Watertown, MA**  
**Founder, Chief Operating Officer** **1995**

- Founded start-up with mission to provide Internet grocery shopping service in Wellesley, MA
- Developed prototype on a shoestring budget with business partners to provide service
- Learned that the business model is not profitable and that having the right team is critical to success

**CUC INTERNATIONAL** **Stamford, CT**  
**Program Manager** **1992 to 1995**

- Developed credit card authorization system for interactive TV tests sponsored by Time Warner and Viacom
- Overhauled fulfillment system, tracking \$200 million in annual revenues
- Trained as a system analyst in database construction and system debugging using IEF Methodology

## ADDITIONAL INFORMATION

**Skills:** CFA Level 2 Candidate, System Analysis and Database design in Windows and VM environments

**Languages:** Conversational Bahasa Indonesian, Mandarin Chinese, and Cantonese

**Volunteer:** Board Member, Corporate Volunteers In Action; Soup Kitchen Captain; Project Angel Tree

**Interests:** Camping, Scuba Diving, Acoustic guitar, gourmet cooking

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## EDUCATION

**THE WHARTON SCHOOL, University of Pennsylvania** Philadelphia, PA  
*MBA Candidate (GMAT 740)* May 2001

- First Year Honors – top 20% of class.
- Leadership mentor to 30 first-year MBA students.
- Performed strategic consulting project for a Fortune 50 medical products company, recommending a new sales force organization and strategy.

**HARVARD UNIVERSITY** Cambridge, MA  
*A.B. Cum Laude in Economics (GPA 3.3)* June 1994

- Worked 15-20 hours per week in school and full-time all summer to support self through college.

## EXPERIENCE

**MERCER MANAGEMENT CONSULTING** New York, NY  
*Summer Associate* Summer 2000

- Wrote white paper on VC investment opportunities in the wireless telecommunication space.
- Analyzed industry trends and the impact of new media on the publishing and direct marketing industries for a leading magazine company.

**AMBIENT CAPITAL GROUP** (investment banking) Los Angeles, CA  
*Associate - Corporate Finance* 1994-1999

### Strategic Analysis

- Analyzed 50 client companies in multiple industries to prepare full, concise presentations for potential investors. Examined issues ranging from technology and management to competition and regulation.
- Worked with clients' senior management to address their company's key weaknesses and likely questions from investors. Dialogue resulted in clearer, more powerful, well-integrated strategies.
- Performed a wide range of financial analyses, including financial projections, industry benchmarking, scenario modeling, returns analysis, and investment structuring. Incorporated strategy into high-level financial models built from scratch.

### Project Management

- Managed assignments such as the valuation of the Univision Spanish language television network (worth \$1.2 billion pre-IPO) which generated over \$225,000 in fees.
- Led the due diligence phase of 30 projects, coordinating teams that included Ambient partners, client executives, and outside advisors. Worked on 2-4 projects at a time.

### Business Development

- Led major internal development efforts: built research capability, suggested innovative partner and staff compensation system, developed technology infrastructure, and managed recruiting.
- Marketed services to potential new clients: active role in all initial meetings, evaluating client quality and fit, determining fees, and writing proposals. Analyzed over 200 business plans.

## ADDITIONAL INFORMATION

Active in stock investing, outdoor sports, and travel.

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## EDUCATION

**THE WHARTON SCHOOL, UNIVERSITY OF PENNSYLVANIA** Philadelphia, PA  
**Master of Business Administration Candidate**, Majors in Entrepreneurial Management and Marketing May 2001

- Selected by Faculty to join elite student team to develop an online sales and marketing strategy for Godiva.com
- Elected to serve on nine-member Wharton Ethics Committee; responsible for outreach initiatives
- Member, Entrepreneurship Club (Conference Committee), Technology Club, and Marketing Club

**MASSACHUSETTS INSTITUTE OF TECHNOLOGY** Cambridge, MA  
**Bachelor of Science in Mechanical Engineering, Concentration in Writing** June 1995

- Completed thesis, "Fatigue Fracture of the Proximal Femur," at Beth Israel Hospital's Orthopedics Biomechanics Lab
- Vice President, Sigma Kappa Sorority (110 members). Oversaw the Standards Board and operations of committees
- Secretary, MIT Class of 1995 • Varsity Women's Lacrosse

## EXPERIENCE

**CORIO, INC.** San Carlos, CA  
**Summer Intern, Marketing Group** Summer 2000

Managed projects in Marketing and Business Development for a leading Application Service Provider (ASP) focused on hosting tier-one enterprise applications. Corio is backed by Kleiner Perkins and went public in July 2000.

- **Product Development.** Developed an online sales tool used to shorten the sales cycle and illustrate the ASP model and Corio's offerings to internal sales force, channel partners, and prospective customers. Oversaw the creation of the Customer Relationship Management (CRM) and eCRM sections of the sales tool.
- **Product Marketing.** Developed collateral and marketing materials to position new service offerings to customers. Briefed IT analysts at leading research houses on Corio's strategy and position within the ASP industry.

**A.T. KEARNEY, INC.** New York, NY  
**Associate, Financial Institutions Group** 1997-1999

- **Project Management.** Managed a sub-project to assess relationship between process cycle times and customer satisfaction at a premier insurance company. Trained client team members and wrote performance evaluations. Presented recommendations for process improvements and reporting metrics to senior clients.
- **Organizational Change/Operations Management.** Co-managed six-person client team to reengineer business processes of a Canadian bank as part of a corporate redesign effort. Led team in mapping process flows and developing process improvements. Developed manager training program to prepare employees for change.
- **Project Development.** Co-developed a successful post merger integration project proposal for a large Canadian financial institution.

**J.P. MORGAN & CO.** New York, NY  
**Analyst, Debt Capital Markets** 1996-1997

- **Financial analysis.** Developed debt pricing models, performed detailed debt profile analyses, and communicated indicative bond pricing to industrial companies and REITs. Recommended maturity, size and type of debt offering. Select transactions include Chrysler Financial's \$300MM issuance; Energy company MAPCO's \$200MM issuance.
- **Marketing.** Presented and evaluated current market opportunities to clients. Marketed fixed-income qualifications.

**Analyst, Mergers and Acquisitions/Advisory — Technology Group** 1995-1996

- **Financial Analysis.** Created numerous financial models including pro forma merger models, IPO valuation models, and accretion/dilution analyses. Analyzed market research and identified industry opportunities and trends.
- **Acquisition execution.** Completed valuation work and merger analysis for Packard Bell Electronics' \$650 million acquisition of Zenith Data Systems. Worked with management to develop financial projections for valuation.
- **Strategic Planning.** Analyzed market entry opportunities and competitive landscape for United States Postal Services' joint venture with American Express to develop and market prepaid phone cards.

## ADDITIONAL INFORMATION

- Conversant in Chinese (Mandarin). Aspiring golfer and photographer. Travel and taekwondo enthusiast.
- Advised President of the Institute of International Education (IIE) on increasing profitability of publishing division.

**RICHARD CHOW**  
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## EDUCATION

**THE WHARTON SCHOOL, University of Pennsylvania** Philadelphia, PA  
Masters in Business Administration Candidate May 2001  
• Concentrations in Entrepreneurial Management and Operations & Information Management.  
• Elected Cohort Academic Representative.  
• Represented Wharton in 1999-2000 Kenan-Flagler Venture Capital Investment Competition  
(*National Finalist, Northeast Regional Winner*).

**THE WHARTON SCHOOL, University of Pennsylvania** Philadelphia, PA  
Bachelor of Science in Economics *cum laude* 1991-1995  
• Concentrations in Finance and Legal Studies.  
• Chairman, Student Activities Council. Rush Chair and Treasurer, Phi Kappa Psi Fraternity.  
• Awarded Solon E. Summerfields scholarship. Tapped into Sphinx Senior Society.

## EXPERIENCE

**INVESTCORP INTERNATIONAL INC.** New York, NY  
*Summer Associate* Summer 2000 - Present  
One of three professionals in Investcorp Technology Ventures, L.P., a \$300 million fund investing domestically in  
the emerging Internet, telecommunications and information technology sectors.  
• Closed investments in Belenos Inc. (\$15 million Series C) and Dotcast, Inc. (\$5 million follow-on Series C).  
• Interviewed investment banks as part of a beauty contest for Q4 IPO exit of an investment.  
• Developed database to track new business opportunities; prepared Fund presentation and marketing materials;  
actively managed investment relationship with (212) Ventures, L.P.

**BOSTON MILLENNIUM PARTNERS L.P.** Malvern, PA  
*Summer Associate* Summer 2000  
Given broad responsibilities for originating, evaluating and negotiating investments in privately held information  
technology, life sciences, and telecommunications companies for this \$650 million fund. Led due diligence sessions,  
drafted letters of intent and term sheets, and recommended opportunities.

**CHESTNUT HILL CAPITAL PARTNERS, LLC** Chestnut Hill, MA  
*Associate* 1998-1999  
One of eight professionals in the \$250 million private equity investment concern of GCC Companies, Inc.  
• Evaluated and structured later-stage investment opportunities that focused primarily on telecommunications  
service providers and equipment manufacturers.  
• Co-led \$45 million Series A preferred equity investment in El Sitio International Corp.

**NEW YORK CITY INVESTMENT FUND, LLC** New York, NY  
*Analyst* 1996-1998  
First analyst hired for \$100 million investment vehicle raised by Henry R. Kravis.  
• Closed preferred equity investments in Star Media Networks, Inc. and TheStreet.com, Inc.  
• Structured joint venture with Ericsson to create CyberLab NY, a business incubator developing wireless Internet  
applications and services.

**SALOMON BROTHERS INC** New York, NY  
*Financial Analyst - Mergers and Acquisitions* 1995-1996  
Participated in all phases of acquisition and divestiture deal execution. Responsibilities included detailed valuation  
and financial impact analysis and evaluation of strategic alternatives for clients.  
• Valuation instructor for summer associates class. Conducted training modules on DCF modeling and market data  
retrieval services.

## PERSONAL

Avid snowboarder and basketball player. James Beard Foundation member. Enjoy discovering haute cuisine  
restaurants, but profess to have dubious culinary talent.

**HEATHER H. CHRISTIE**  
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Heather.Christie.wg01@wharton.upenn.edu

## EDUCATION

### **THE WHARTON SCHOOL, University of Pennsylvania**

*Master of Business Administration Candidate*

Dual Major in Health Care Management and Marketing

- Executive Director – Wharton Health Care Speaker Series; Management Board – Health Care Club
- International Consultant – Wharton Health Care International Volunteer Project (WHIP – Philippines)

Philadelphia, PA  
May 2001

### **HARVARD SCHOOL OF PUBLIC HEALTH**

*Intensive Coursework in Health Care Management, Policy, and Medical Ethics*

Cambridge, MA  
Summer 1998

### **YALE UNIVERSITY**

*Bachelor of Arts*

Psychobiology - Distinction in the Major

- National Psychology Honor Society; Executive Officer – Pi Beta Phi; Women's Varsity Crew; Yale Psychological Society

New Haven, CT  
June 1994

## EXPERIENCE

### **ELI LILLY & CO**

*Summer Intern, Marketing and Strategy*

*Developed a strategy for Lilly's \$1.6B diabetes franchise.*

- Led market research efforts, including focus groups, key opinion leader interviews, and industry and competitive analysis.
- Identified potential market and scientific trends, specified implications, and provided strategic recommendations and action steps.
- Established indicators and signposts to develop a diabetes market monitoring system through the use of scenario planning.

Indianapolis, IN  
Summer 2000

### **HEALTH SCIENCE COMMUNICATIONS, INC.**

*Program Director, Medical Education and Advocacy Development*

- Created and presented strategic sales proposals to potential pharmaceutical clients. Acquired the business of 2 major clients.
- Managed a \$1M program budget and supervised a 15-person team to implement a pre-launch strategy and to execute tactics.
- Led advocacy and speaker development efforts to support a new pharmaceutical drug launch. Designed and orchestrated 2 advisory board roundtables and an educational conference for more than 250 people.
- Produced a scientific slide kit to increase the awareness of new treatment options. Kit is now in use by over 200 physicians.
- Devised and managed the execution of a publication strategy to support drug launch. Published 9 articles in medical journals.
- Engineered and implemented a pre-launch oncology speaker bureau. Developed speaker database, authored instructional manual, and trained dentiresales force on bureau operations. Supervised execution of more than 100 speaking engagements.

New York, NY  
1998-1999

### **ERNST & YOUNG LLP**

*Associate Consultant, Internal Strategic Consulting*

- Evaluated the opportunity for e-commerce business concepts, contributing to the development of E&Y's Internet strategy.
- Authored and published a white paper on Professional and Organizational Development used to analyze E&Y's department.
- Initiated and facilitated a leadership and teamwork workshop for 25 people, resulting in formalized development efforts.
- Managed a team of 10 to execute an ongoing project reporting noteworthy client financial difficulties to partners.

New York, NY  
1995-1998

### **THE WILKERSON GROUP, INC.**

*Research Associate, Health Care Consulting*

- Researched and analyzed pharmaceutical industry market dynamics and communicated findings via proprietary strategic report.
- Managed and executed joint project with *In Vivo: The Business and Medicine Report* to write and publish article evaluating key drivers of competitive advantage for the pharmaceutical, biotechnology, and medical device industries.
- Conducted market opportunity assessments for products including an antipsoriasis drug and a novel drug delivery mechanism.

New York, NY  
1994-1995

## ADDITIONAL INFORMATION

- Wharton Biotechnology, Marketing, and Running Clubs. Christmas in April. Wharton Women in Business. Student-Faculty Liaison. Advanced French. Founding Member – University Women's Professional Group. Alumni Interviewer – Yale and Hotchkiss. Professional Dog Handler. Enjoys swing dancing, diving, reading, travel, entertaining, and skiing.

## ALEXCHU

1500 Locust St., Apt. 3602 Philadelphia, PA 19102

Phone: (215) 790 -1771

Email: [axchu@wharton.upenn.edu](mailto:axchu@wharton.upenn.edu)

Personal Website: [www.axchu.homestead.com](http://www.axchu.homestead.com)

## EDUCATION

### THE WHARTON SCHOOL, University of Pennsylvania

Philadelphia, PA

Master of Business Administration Candidate

May 2001

- Consulted the Greater Philadelphia Film Office (GPFO) on its strategy to attract producers to film in Philadelphia

### QUEEN'S UNIVERSITY

Kingston, Canada

Bachelor of Arts (Honors), Economics

1992-1996

- First Class Honors (Top 10% of Graduating Class)

## EXPERIENCE

### MONDOMEDIA ([www.mondominishows.com](http://www.mondominishows.com))

San Francisco, CA

Clear Thinker – Business Development & Corporate Strategy

Summer 2000 - Present (Part - Time)

- Authored the Series C Private Placement Memorandum for Mondo Media, a digital animation company that produces, acquires and syndicates animated content for the Web, television, and wireless markets
- Identified, contacted and presented to major Hollywood studios, New York media companies, and venture capital firms; secured lead investment from a top - tier venture capital firm and a Hollywood studio
- Established weekly sales metrics at each stage of the sales cycle for the company's sales force
- Collaborated with engineering team on designing a scalable technology architecture for delivery of syndicated digital content

### CREDIT SUISSE FIRST BOSTON ([www.csfb.com](http://www.csfb.com))

Singapore

Investment Banking Analyst - Corporate Finance/Mergers & Acquisitions

1998-1999

- Constructed valuation models for Asia - Pacific companies and presented to clients possible financing and strategic solutions in the context of their future business prospects, financial position, and legal framework
- Identified and contacted US and European acquirers; managed and structured the bidding process; selected and liaised with legal counsel, and represented Asian clients during due diligence sessions
- Prepared Information Memoranda that were sent to potential buyers; reviewed, edited and negotiated legal contracts related to the transaction; managed the development of the Data Room for due diligence
- Ranked in top 5% within the global analyst pool of 150 during the 360 - degree annual review

### CREDIT SUISSE FIRST BOSTON ([www.csfb.com](http://www.csfb.com))

Hong Kong

Investment Banking Analyst - Equity Capital Markets

1997-1998

- Presented financial proposals to Asian corporations; analyzed, structured, and priced convertible bond issues; maintained a weekly client newsletter (valuation, M&A activity) on Asian technology companies
- Managed equity syndication process; coordinated road shows in Hong Kong, London and New York, conducted investor demand analysis, determined allocation of issues to each investor, and negotiated final pricing
- Led analyst and associate recruiting efforts in the Asia - Pacific region; organized campus presentations and interviewed candidates

### RBC DOMINION SECURITIES (RBCDS) ([www.rbcds.com](http://www.rbcds.com))

Toronto, Canada

Marketing Analyst – Business Development Group (Private Client Services)

1996-1997

- Conducted market segmentation studies, developed pricing, positioning and promotion strategies for new products, and implemented a re - positioning strategy that allowed RBCDS to compete effectively against discount brokers
- Launched a wealth management product targeting young, high - income professionals, a neglected segment
- Created best practice guidelines on client acquisition and retention, developed sales force compensation programs, organized leadership seminars, and re - designed company website

## ADDITIONAL INFORMATION

- Web publishing ([www.axchu.homestead.com](http://www.axchu.homestead.com)), creative writing, playing guitar and keyboards; traveling
- Languages: English (Native), Mandarin (Fluent), and Taiwanese (Functional)

**ALAN B. CHUN**  
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alan.chun@post.harvard.edu

## EDUCATION

**THE WHARTON SCHOOL, University of Pennsylvania** Philadelphia, PA  
**Master of Business Administration** Summer 2001

- Dual major in Operations and Information Management and Entrepreneurial Management with finance focus.
- Director's List, spring 2001 (top 10% of class).
- Ford Motor Company Fellowship for study of decision-making process in design/construction profession, spring 2000.
- Graduate Student Representative, University of Pennsylvania Board of Trustees Committee on Facilities and Planning.

**HARVARD UNIVERSITY GRADUATE SCHOOL OF DESIGN** Cambridge, MA  
**Master of Architecture** Summer 1996

- Rotary International Scholar to Barcelona, Spain. Received Master of Industrial Design with honors from the Polytechnic of Catalunya, 1994.
- Nambu Foundation Fellowship for study of Japanese construction techniques and industry in Osaka, Japan, 1995.
- Published in Harvard University publication *Studio Works*, highlighting exemplary Master of Architecture theses, 1996.

**DARTMOUTH COLLEGE** Hanover, NH  
**Bachelor of Arts in Classical Studies, *cum laude*** Summer 1991

## EXPERIENCE

**SKIDMORE, OWINGS & MERRILL LLP** San Francisco, CA; New York, NY  
**Architect/Project Manager** 1997 - 1999, Fall 2001

- Prepared service proposals, manpower estimates, and fee projections for various projects including the NYSE, Columbia University, and the Bank of New York. Developed financial spreadsheets tracking project accounts receivables, project budgets, and construction costs using Allegro and Advantage financial and accounting software.
- Planned and executed delivery of critical components of the \$200 million, 27-story West Coast headquarters of Arthur Andersen and collaborated with engineers and subcontractor to meet accelerated project schedule deadlines.
- Identified cost savings with client of a new \$300 million Pacific Stock Exchange Building in San Francisco through strategic decisions in purchasing, material selections, and design specifications.

**RAZORFISH, INCORPORATED** New York, NY  
**Strategist, Mobile Solutions** Summer 2000

- Led six-member team in product development concepts for wireless device that enables coordination and exchange of digital drawings for the \$750 billion architecture, engineering, and construction industries. Presented promotional pitch to prospective clients.
- Created market entry strategy for Razorfish's Mobile Solutions Group that included competitor analysis and internal resource planning recommendations. Tested and modified financial model to quantify impact of mobile technology offerings and services on client's revenues.
- Co-authored wireless technology section of white paper addressing future technology applications for Big Five professional services client. Directed technologists in prioritizing client's technology initiatives for next five years.

**KOHN PEDERSEN FOX ASSOCIATES, PC** New York, NY  
**Architect, 745 Seventh Avenue Project for Morgan Stanley/Dean Witter** 1999

- Designed and developed construction detail of foundation for the \$600 million Class A office tower in Times Square and coordinated design with engineers in preparation for building construction.
- Negotiated with engineers and Mass Transit Authorities in design and construction of the linkage of new building to existing public transportation infrastructure and historic Rockefeller Center.
- Collaborated with design consultants, construction contractors, and representatives of the Rockefeller Development Corporation to establish and manage components of project budget.

## ADDITIONAL INFORMATION

- Interests: alpine skiing, mountain biking, travel, reading.
- Spanish Language Proficiency Certificate, superior level, from The University of Barcelona, 1994.

**RICHARDCLAIRMONT**  
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## EDUCATION

### **THEWHARTONSCHOOLandTHELAUDERINSTITUTE** **UniversityofPennsylvania**

Philadelphia,USA  
May2001

*MasterofBusinessAdministrationCandidate,MajorinFinance andEntrepreneurialManagement*  
*MasterofArtsCandidate,ConcentrationinAsiaandJapaneseLanguage*

- Member - Lauder CommitteeofAdmissionsandScholarships
- Member – WhartonFinance Club,JapanClub, Entrepreneur’sClub,e -CommerceClub
- Center,Right -wing - WhartonIceHockeyTeam

### **UNIVERSITYOFWATERLOO**

Waterloo,Canada  
May1992

*BachelorofAppliedScience,ElectricalEngineering*

- StudentIntern ships -IBM,NorthernTelecom,Canadian AerospaceElectronics,CanadianBroadcastingCorporation
- ClassPresident -EngineeringSociety
- GroupLeader -OrientationCommittee
- HouseRepresentative -StudentResidenceCouncil

## EXPERIENCE

### **DELOITTECONSULTING**

SanFrancisco,USA  
Summer2000

*SummerAssociate,Client:newB2Bexchangecreatedtoservicehigh -techmanufacturingindustry*

- Conducted a survey of B2B exchanges across several industries and analyzed underlying cost structures and technology architectures,providingtheclientwithaframework usedforthepurchaseandassemblyofitsowntechnologyplatform
- Organizedaseriesofpanel discussionsinvolvingtheCFO,CTO,andanexternalgroupofexistingexchanges,allowingthe clienttoidentifytechnological,financial,andoperationalbest practicesandtoincorporatethesewithitsownstrategies
- Produced a high -level guide to building B2B exchanges that was presented to the client and published on the Deloitte Consultingresearchintranet

### **MORGANSTANLEYJAPANLTD.**

Tokyo,Japan  
1997 -1999

*InformationTechnologyAssociate,AssetManagementDivision*

- Initiatedtheuseof Internettechnology,allowingforthe developmentofonlineapplicationswhichgreatlyenhancedmanyareasofthe firm’sbusinessincludingoperations,tradingandfundmanagement
- Developedanequitytradingssystemwhichprovidedadirectlinkbetweenfundmanagersand Tokyobrokers ,allowing stockordersand executionstobecarrriedoutovertheInternet
- Implementedaweb -basedriskanalysis system whichevaluated portfolio exposure tocurrenyandinterestrate fluctuations,adding a significantdegreeofsafetytothecooperativeeffortsofEuropean,American,andJapanesefundmanagers

### **GOLDMANSACHS(JAPAN)LTD.**

Tokyo,Japan  
1994 -1997

*InformationTechnologyAnalyst,EquityDivision*

- Developedarealtimealarm systemthat producedwarning signalsas securityprices moved beyond userdefined limits,thus allowing brokersinNewYorkandTokyo tofocusless on pricemonitoring, andmoreonproductive salesrelatedactivities
- Designedasaletrackingssystemwhichanalyzedtrends incommission generatedbytheequitysalesdivisionandallowedpartnersofthe firmtoevaluatetherelativeimportanceofclientsaswellastheindividualperformanceofsalespeople
- Providedb ilingualtechnicalsupportforinformationsystemsusedbytheequitysalesdivision,allowingnearlyfiftybrokerstofunctionina consistentandreliableenvironment

### **SAMTECHINC.**

Osaka,Japan  
1992 -1994

*ProductDevelopmentEngineer,ProductDevelopmentGroup*

- ActedasalialiaisonbetweenAmericanandJapaneseengineerstroughouteffortstoimportnewautomobilemanufacturingtechnologyto Japan,andallowedthefirmto deal effectivelywithWesterncompaniesontechnical matters forthefirsttime
- TraveledwithJapaneseengineerstoU.S.vendorsiteinordertoconductfinaltestingandshippingofmanufacturingequipmentvaluedat approximately\$2million,contributingtoits successfulintegrationwiththefirmsexistingoperations
- ProvidedJapanesetr ainingoncomputer controlledoperationofimportedmanufacturingequipment,andoversawthesmoothtransferof WesterntechnologytoJapanesemembersofmyengineeringteam

## ADDITIONALINFORMATION

- SpeakFrenchandJapanese
- Participateinmanysportsincluding ice hockey,downhillskiingandsurfing
- Havetraveledthrough out theUS, CentralAmerica,Australia,England,France,Japan,China, HongKong, andSouthKorea

**BRIAN CLIFFORD**  
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## EDUCATION

**THE WHARTON SCHOOL, University of Pennsylvania** Philadelphia, PA  
*MBA Candidate in Finance and Information: Strategy, Systems and Economics* May 2001  
• Member, Private Equity and Entrepreneurs Clubs.  
• Captain and player/coach, Wharton Wildmen Ice Hockey.  
• Provided key analyses for startups Asset TRADE, Web Swap, Deal Maven and Mercantex (student and paid consulting projects).

**BOWDOIN COLLEGE** Brunswick, ME  
*Bachelor of Arts in German, Cum Laude* May 1993  
• Four-year letter winner, Men's Varsity Ice Hockey.

## EXPERIENCE

**SAFEGUARD SCIENTIFICS, INC.** Wayne, PA  
*Summer Associate, Pennsylvania Early Stage Partners (a Safeguard -affiliated private equity fund)* Summer 2000  
• Assessed deals in the area of eServices, including wireless, MSP, ASP, and remote services.  
• Improved internal operations by streamlining screening and due diligence process. Analyzed strategic issues with investment team and portfolio companies after conducting due diligence. Constructed and maintained valuation tables for investments.  
• Worked closely with portfolio: Introduced key strategic partner to new portfolio company; Evaluated HR outsourcing vendors and initiated relationships; Wrote business plan for an IT services company beginning Series B round; Identified target clients for a company that provides medical information.  
• Led initiative to bring in best business school ventures and strengthen ties to top young talent.

**DIAMOND TECHNOLOGY PARTNERS, INC.** Chicago, IL  
*Analyst* 1998-1999  
• Performed as member of client teams for projects involving CEO-level strategic issues in a variety of industries.  
• Developed investment framework for the new corporate venture unit of a major U.S. commercial bank.  
• Conducted analysis of a global investment bank's major IT projects to improve CIO oversight and management.  
• Redesigned the website for a major non-profit organization to harness the strength and value of its community.  
• Assessed Internet's impact for one of the country's leading newspaper companies and refined its Internet strategy.

**MORGAN STANLEY DEAN WITTER & CO.** New York, NY  
*Analyst, Information Technology* 1996-1998  
• Led team that converted operating system for firm's New York Asset Management and Operations units.  
• Initiated project to interview over 800 clients to identify and eliminate unnecessary applications. Initiative cut groups' support costs by \$6 million/year.  
• Managed issues between clients, support offices, project manager, and technical team.

**J. WILLIAM FULBRIGHT SCHOLAR** Dresden, Germany  
• Taught at the Technische Universität Dresden and a German high school. 1994-1996

**PHILLIPSEXETER ACADEMY** Exeter, NH  
*Instructor* 1993-1994  
• Taught first and second-year German, coached Girl's Ice Hockey and Boy's Soccer, and advised student groups.

## ADDITIONAL INFORMATION

• Professional musician, New York, NY 1996-1998  
• Professional ice hockey player, ESC Dresden, Dresden, Germany, 1994-1996  
• Enjoy outdoor activities, biographies, and spending time with family in Maine

**MARISHAL CLINTON, CPA**  
3514 Lancaster Avenue, Apt. 107  
Philadelphia, PA 19104  
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### EDUCATION

**THE WHARTON SCHOOL, University of Pennsylvania** Philadelphia, PA  
**Master of Business Administration Candidate, Dual Major in Finance and Strategic Management** May 2001

- Chairwoman, Whitney M. Young, Jr. Memorial Conference (2000 -2001)
- Director of Corporate Logistics, Whitney M. Young, Jr. Memorial Conference (1999 -2000)
- Investment Manager, Wharton Investment Challenge
- Member, Finance Club, Investment Management Club, and African American MBA Association

**HOWARD UNIVERSITY** Washington, DC  
**Bachelor of Business Administration, Accounting** May 1992

- Board of Trustees Academic Scholarship Recipient
- Elected Treasurer, Howard University Dance Ensemble

### EXPERIENCE

**GOLDMAN, SACHS & CO.** New York, NY  
**Summer Associate, Global Investment Research** Summer 2000

- Worked independently for highly reputable analyst to publish comprehensive report on global expansion of Internet e-commerce businesses. Covered companies include Amazon.com, eBay, eToys, and Priceline.com. -Tailing
- Conducted interviews with international senior management teams and analysts to better assess consumer e-commerce industry trends, growth opportunities, and overall company strategies for margin improvement. -commerce
- Participated in company meetings and analyst conference calls; assisted in research notes write-ups to sales force and clients. -upto sales force and clients.

**SUBURBAN HOSPITAL** Bethesda, MD  
**Senior Accountant, Financial Reporting and Payroll Supervisor** 1997 -1999

- Oversaw the maintenance and reconciliation of the hospital's \$100+ million investment portfolio and performed investment allocation reviews. Researched market fundamentals, which served as the basis for explanations of portfolio performance.
- Managed the financial reporting functions for the hospital, its entities and joint business ventures in conjunction with preparing company financial statements.
- Supervised 4 payroll analysts in the accurate processing of the bi-weekly payroll for the hospital's 1,600 employees.
- Conducted payroll presentation during monthly orientation, and participated in recruiting, interviewing, and new hire training. -hire training.

**APOGEE/METROPOLITAN PSYCHIATRIC GROUP** Bethesda, MD  
**Controller** 1995-1997

- Managed the financial activity of 12 medical centers in Suburban Maryland, Northern Virginia, and the District of Columbia.
- Developed a multi-million dollar operating budget that resulted in over \$700,000 in savings.
- Performed general ledger maintenance in conjunction with accounting for over \$21 million annually and reported the results of operation to corporate headquarters in a timely manner.
- Supervised accounts payable and payroll staff in addition to monitoring employee performance.

**MID ATLANTIC MEDICAL SERVICES, INC.** Rockville, MD  
**General Ledger Accountant** 1994 -1995

- Prepared workpapers for 6 subsidiaries and oversaw monthly closings, a vital aspect of the presentation of company financial statements.
- Reviewed 10K to ensure proper disclosures in compliance with GAAP, GAAS, and SEC requirements.

**Accounts Payable Accountant** 1992 -1994

- Assisted the restructuring of the accounts payable system, thus successfully improving productivity within the accounts payable and mailroom departments by 40%.
- Processed medical payables for subsidiaries by running checkwrite procedures to provide payment to company clients.

### ADDITIONAL INFORMATION

- Certified Public Accountant (CPA) in the State of Maryland.
- Independently owned and operated an income tax/money management business for 5 years.
- Treasurer, TFG Group Investment Club. Presented and defended investment recommendations to club members. Helped these partners earn a 50% net profit.
- Counselor, "Step Afrika!" Cultural Exchange, Johannesburg, South Africa.
- Interests include managing my personal investment portfolio, dancing, swimming, and reading. Proficient in Spanish.

**JENNIFERA. COBLEIGH**  
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## EDUCATION

**THE WHARTON SCHOOL, University of Pennsylvania** Philadelphia, PA  
**Master of Business Administration Candidate**, Finance and Entrepreneurial Management May 2001

- Director's List (Top 10% of Class) – Fall 1999/Spring 2000, Top 1% GMAT
- Member, Private Equity Club (Conference Committee), Finance Club, Technology Club
- President, Guiding Undergraduates in their Development and Education (G.U.I.D.E.)
- Cohort Alumni Representative, Wharton Admissions Volunteer, Wharton Wildmen Ice Hockey

**UNIVERSITY OF VIRGINIA** Charlottesville, VA  
**Bachelor of Arts in Biology with Distinction** May 1994

- Phi Beta Kappa, Cumulative GPA: 3.8/4.0, Dean's List
- Director, UVA Hospital Operating Room Volunteer Program
- Vice President and Co-Captain, UVA Women's Field Hockey Club

## EXPERIENCE

**GEEQUITY** Stamford, CT  
**Summer Associate, Business Services Group** Summer 2000

*Identified, evaluated, and executed venture capital and private equity investments for GEEquity, the private equity arm of General Electric Company. GEEquity has approximately \$4 billion under management in over 300 portfolio companies.*

- Evaluated investment opportunities in e-commerce and related technology sectors. Reviewed business plans, conducted industry research, met with management teams, and recommended attractive opportunities to investment professionals.
- Actively involved in all aspects of the investment process, including terms sheet drafting and negotiation, business and financial due diligence, investment committee approval, legal documentation, and post-closing monitoring and advisory.
- Developed comprehensive financial analysis for two investments. Modeled projections for base business and various potential add-on acquisitions, assessed transaction structure and feasibility, and analyzed potential returns.
- Pending investments include \$10 million lead investment in a biometric technology provider, \$10 million investment in leveraged recapitalization of an automotive part supplier, and \$7 million investment in a sports products company.

**J.P. MORGAN & CO.** New York, NY  
**Associate, Investment Banking** 1997-1999

*Provided M&A and corporate finance advisory services to clients in a variety of industrial and healthcare sectors. Earned accelerated promotion to MBA-level position in Investment Banking. Received top-tier ranking in all performance reviews.*

- Advised clients on a wider range of domestic and cross-border transactions including acquisitions, divestitures, mergers, spin-offs, and debt and equity offerings. Geographic experience includes Canada, Mexico, U.K., and South Africa.
- Played a leading role in the \$850 million acquisition of Equity Corporation International. Developed comprehensive valuation and pro forma analysis, and worked directly with a Managing Director on deal structuring and announcement.
- Managed pending divestiture of a global automotive parts business. Guided senior management in preparation of descriptive memorandum and financial projections. Coordinated due diligence and served as a primary contact for potential buyers.
- Led complex capital structure analysis for separation of Vencor Inc. into operating company and REIT. Facilitated financing recommendations of cross-product team and assisted with \$300 million high yield issuance and \$2.2 billion syndicated loan.
- Managed business development initiative that led to the \$2.2 billion buyout of Tenneco Inc.'s container board business. Supervised extensive industry research and combination analysis, and participated in dialogue with key industry players.

**Associate, Corporate Recruiting** 1995-1997

- Selected to lead start-up team in launch of undergraduate recruiting program for J.P. Morgan Investment Management.
- Managed relationships with 20 schools. Conducted 60 presentations and 900 interviews. Promoted to Associate in 1996.

**Analyst, Management Services** 1994-1995

- Completed strategic consulting assignments for J.P. Morgan businesses in New York, Singapore, and Hong Kong.
- Assessed credit risk of 150 leveraged funds. Led Asia-Pacific team in review of Sales & Trading technology strategy.

## ADDITIONAL INFORMATION

- Worked with a B2B startup on marketing strategy and competitive positioning as a member of student consulting team.
- Active in community service including Wharton Jingle Bell Run Committee, Christmas in April, and NYC Achilles Kids.
- Interests include biking, swimming, scuba, golf, and skiing. Extensive travel in North America, Asia, Europe, and Africa.

**EMILY M. COHEN**  
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## EDUCATION

**THE WHARTON SCHOOL, University of Pennsylvania** Philadelphia, PA  
**Master of Business Administration Candidate in Marketing and Strategic Management** (GMAT: 730) May 2001

- Selected to Wharton Global Consulting Practicum: Created U.S. market entry strategy for Mexican wheel manufacturer
- 2<sup>nd</sup> Place, 1999 Wharton Marketing Case Competition; Wharton - Omnicom Comm. Fellow; TA, Marketing g621 (MBA core)

**THE GEORGE WASHINGTON UNIVERSITY** Washington, D.C.  
**Bachelor of Arts in English** *cum laude* May 1994

- Golden Key National Honor Society; Dean's List (4 years); National Merit Scholarship; Reporter for *GWHatchet*
- Junior Year Abroad - Univ. of East Anglia, Norwich, Eng.; Self-financed 100% of education through scholarships, employment

## EXPERIENCE

**BAIN & COMPANY** San Francisco, CA  
**Consultant** June-August 2000, August 2001 - April 2002

Perform strategic analysis for clients/potential clients in consumer products, retail and high tech industries

- *Retail food/consumer products*: Evaluated pricing strategy to optimize pricing, maximize profit, retain customers. Assessed differential pricing opportunities, customer elasticity. Benchmarked pricing strategies, identified opportunities, client weaknesses.
- *High tech contract manufacturing*: Analyzed competitive landscape and key players in contract manufacturing industry.
- *High tech/software*: Synthesized available information on innovation process into foundation for new thought framework, analyzed innovation history, market dynamics and potential for client's enterprise applications division.
- *Retail/consumer products*: Assessed client's competitive position, key competitors, market potential, dynamics and trends, focusing on multi-channel issues. Analysis provided context for creation of growth strategy and delineation of channel roles.

**COMM CORE CONSULTING GROUP** Washington, D.C./New York, NY  
**Director, Marketing & Communications** 1996 - 1999

Directed marketing, positioning firm to capitalize on growth opportunities, industries. Managed, developed client relationships, managing expectations, evaluating needs, designing/coordinating goal-oriented programs for industries including television, consumer products/beauty, communications, pharmaceutical, and consumer technology. Managed informal P&L for New York office.

- Assessed market potential, identified growth segments, created and implemented targeted marketing strategy to revitalize underperforming office. Resulted in a 40% increase in office billings for 1998, and a projected 90% increase in 1999.
- Identified gap in firm portfolio and led multi-functional team, including outside vendors, in creation and introduction of innovative crisis communications software, expanding the product mix.
- Spearheaded design, implementation of email/voice mail skills seminar for major investment bank. Coordinated delivery of program in 3 countries, completing project 25% under budget.
- Grew repeat business by as much as 212%. Client skills specifically cited as factor in choice of Comm Core.

**Manager, Marketing & Communications** 1994 - 1996

Managed public relations activities, supervising PR/Marketing Associate and interns. Consultant on marketing communications projects. Managed pricing, positioning strategies for government and private sector competitive contracts.

- Worked with client team to create internal communications guide consistent with goals of restructure firm.
- Authored chapter on new brainstorming technique for principals' book, edited company newsletter and wrote magazine articles.

**PR/Marketing Associate** 1993 - 1994

Developed, managed media materials and relationships. Benchmarked competitors, recruited strategic partners to expand services.

- Pitched firm to targeted industry publications. Resulting articles generated more than \$25,000 revenue within 3 months.

**EZCD.COM** New York, NY  
**Corporate Communications Advisor** 1997 - 1999

Key advisor to e-commerce start-up on marketing communications strategy for traditional and online media.

- Placed articles in strategic publications, exposing over 4 million targeted potential customers to the site in one month.
- Positioned site as "hot trend" through strategic tie-ins with events like Trends 2000, hosted by Faith Popcorn and *Swing* magazine

## ADDITIONAL INFORMATION

Additional Experience: Entertainment industry, Capitol Hill, Retail sales (apparel, food, sport equipment), Promotions (liquor, hair care products)\*Member, Screen Actor's Guild (Professional Actress, 1972 - 1985)\*Wharton Marketing Club, Media & Entertainment Club, Consulting Club\*Volunteer: Hands On San Francisco, San Francisco International Film Festival\*Language: Basic French, Spanish -pursuing Spanish language studies, including 2 weeks immersion at CLIC, Seville, Spain 4/01

**OMARCOLLAVIZZA**  
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### EDUCATION

**THEWHARTONSCHOOL,UniversityofPennsylvania** Philadelphia,PA  
*MasterofBusinessAdministration:FinanceandStrategic Management* May2001

- AwardedWhartonDirector'sHonorListFall'99andSpring'00.
- AppointedInternationalRepresentativefortheAdmissionsOffice.
- ActivememberofEuropean,Consulting,FinanceandPrivateEquityClubs.
- Achievedtop1%GMATscore.

**UNIVERSITÀCOMMERCIALELUIGIBOCCONI** Milan,Italy  
*BachelorinBusinessAdministration:FinancialIntermediaries* March1996

- FinalGrade110/110cumlaude;Rankedtop1%oftheClass;GoldMedalforGraduationHonors.
- SelectedExchangeStudentwiththeMBA -ProgramofUniversityofBritishColumbia,Vancouver,fall1994.

### EXPERIENCE

**GOLDMANSACHSINTERNATIONAL** London,UK  
*SummerAssociate,InvestmentBankingDivision -CommunicationsMediaTechnology* 2000

- **M&AofTechnologyCompanies** :Contributedtotheevaluation oftheCompanyandparticipatedinthenegotiation phase.AssistedtheclientduringthemeetingswiththecounterpartaftertheacceptanceoftheTermSheet.
- **M&AofTransportationCompanies** :Conductedanalysisoftheindustrytodefinetherationalefor theintegration andthepotentialproblemsofthetransaction.Contributedtothecreationofamodeltoevaluatethetwocompanies andthecombinedentity.
- **SecondaryEquityOffering** :ParticipatedontheassessmentoftheOfferingPriceforthecompletionofthe privatizationofagovernmentcontrolledcompanyinItaly.
- **IPO**:contributedtothepreparationofthedocumenttodecidethepricerangefortheoffering.

**GEMINICONSULTING** Milan,Italy  
*SeniorConsultant,StrategyDiscipline* 1996 -1999

- **LeadingEuropeanTelecomOperator** :AnalyzedstrategicalternativestoenterE -business.Coordinatedthe creationofaframeworktoidentifybusinessopportunitiesforthecompany.
- **LeadingEuropeanMobileOperator** :Conductedhigh -levelanalysisoftheimpactof theEurooverthebilling processesofthecompany(yearlybillingof\$3.5billion).Preparedalternativeactionplansandimplementation budget.ManagedinterfaceswithseniormanagersofIT,MarketingandFinanceDepartments.
- **LeadingEuropeanRetailBank**:Ledteamoffourpeopletocreateamodeltomonitorperformanceanddetermine growthpotentialoftheItalianbranchesofthebank.AnalyzedEuroimpactonretailbankingbusinesscreatinga short termactionplan.Managedrelationshipwithsenior management.
- **ItalianNationalBank** :Preparedmarketingplanforretailpaymentsystemsgenerating\$10millionofincremental profit.Managedrelationshipwithseniormanagementandfacilitatedworkshops.
- **RegionalItalianBank** :Designedthecommercialstructureofaretailbank;identifiedcriteriatobuildhomogeneous portfoliosofclientsandexploitprofitablecross -sellingopportunities.
- **ItalianPharmaceuticalGroup** :LedateamoffivepeopletoredesigntheCorporateStrategyandFinance Departments,managingtherelationshipwiththeCFOoftheGroup.Interactedwithseniormanagementinorderto preparetheten -yearstrategicplanoftheGroup(turnover\$500million).
- **LeadingEuropeanPVCProducer** :AnalyzedsupplychainatsitesintheUK,Germany andItaly,leadingtoatwo - yearfollow -upproject.Coordinateddemandforecastingandproductionsschedulinganalysis.

**CASTMANAGEMENTCONSULTING** Milan,Italy  
*Analyst* 1996

- **BusinessDevelopmentAgency** :Evaluatedgrowthpotentialofsmallcompaniesapplyingforfundsorincubation.
- **MajorItalianTextileCompany** :AnalyzedmarketdevelopmentopportunitiesinPoland.

### ADDITIONALINFORMATION

**Languages:**FluentinEnglishandItalian,workingknowledgeofFrench

**EZPrints.com(US)** :ContributedtoaconsultingprojectwithotherfourWhartonstudentstoidentifyandevaluatebusiness developmentopportunitiesintheprintingofdigitalimagesbusiness.

**Interests:**Traveling,reading(Italiancontemporaryliterature),cinema,runningandswimming.

**LORENA.COMPTON**  
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Philadelphia,PA19104  
215-382-6252  
loren.compton.wg01@wharton.upenn.edu

### EDUCATION

**THE WHARTON SCHOOL**, University of Pennsylvania Philadelphia, PA  
**Candidate for Master of Business Administration, Finance/Strategic Management** May 2001

- Robert A. Toigo Foundation Fellow
- Investment Management Club, Wharton Fellows Fund Analyst
- Whitney M. Young, Jr. Memorial Conference, Director of Corporate Relations
- Wharton Graduate Association, First-Year Cohort Coordinator

**SPELMAN COLLEGE** Atlanta, GA  
**Bachelor of Arts, Psychology, Cum Laude, Member of Dean's List & Honor Roll** May 1995

- Spelman Student Government Association: Freshman Council and Women's Health Issues Committee Chairwoman

### EXPERIENCE

**GOLDMAN, SACHS & CO.** New York, NY  
*Associate – U.S. Value Active Equity* June 2000 – August 2000

- Conducted detailed fundamental research and analysis of American Express Company which included examining industry and company issues, modeling earnings projections, and determining valuation based on earnings and free cash flows. Presented investment thesis and portfolio weight recommendation to team of 10 portfolio managers and analysts.
- Researched the potential effect of the DVD market on media companies such as Disney, Time Warner and Seagram in terms of strategy, issues, risk, and earnings. Presented industry report to team of 10 portfolio managers and analysts.

**AXXON CAPITAL, INC.** Boston, MA  
*Associate* May 2000 – June 2000

- Conducted industry and company due diligence, determined valuation, and drafted investment committee memorandums.
- Worked directly with managing partners to assess opportunities primarily within online business-to-business exchanges and business-to-consumer networks.

**CITIGROUP, INC.** New York, NY  
*Senior Financial Analyst – Corporate Financial Planning & Analysis* September 1997 – June 1999

- Performed regression and net present value analyses to identify strategic opportunities within the asset management division in order to maximize the utility of synergies and strengths from Salomon Smith Barney and Citibank.
- Prepared monthly performance trend analyses and special presentations of Salomon Smith Barney, SSBCiti Asset Management and Travelers Property Casualty for Chief Financial Officer's monthly business unit review meetings and meetings with Board of Directors, the Federal Reserve, and the investment community.
- Coordinated legal, budget, telecommunications, systems, and facilities efforts for Year 2000 readiness project.

**TRAVELERS GROUP, INC.** New York, NY  
*Financial Analyst – Corporate Management Rotation Program* June 1995 – August 1997

- Rotations included Smith Barney Global Risk Management, Travelers Group Investor Relations, Smith Barney Planning & Analysis, and Smith Barney Security Operations & Systems Development.
- Monitored all Capital Markets/Commodities trading desks for unauthorized risk and position limits.
  - Conducted industry/competitor analyses; developed senior management presentations for investment community.
  - Created and maintained broker/dealer competitor financial models; prepared quarterly financial analysis and supplemental company statistics for press releases.
  - Consulted with various line operation groups to determine the level of effectiveness within their business processes while implementing my recommendations to improve processes and realize cost savings in excess of \$100,000; analyzed and determined allocations for Systems Development departments.

### ADDITIONAL INFORMATION

- President, New York Chapter of the National Alumnae Association of Spelman College, 1997 – 1999.
- Interests include cycling, hiking, community service, movies and classical ballet.

## REGINA CONGRAVE

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regina.congrave.wg01@wharton.upenn.edu

## EDUCATION

### THE WHARTON SCHOOL, University of Pennsylvania Philadelphia, PA

*MBA Candidate* May 2001

- Concentrations: Entrepreneurial Management, Operations and Information Management
- Director's List, First-Year Honors

### UNIVERSITY OF ILLINOIS Champaign, IL

*Bachelor of Science in Finance* May 1994

- Graduated with Highest Honors; Cumulative GPA: 3.9/4.0; Major GPA: 4.0/4.0
- University of Warwick - Business and European Studies; Academic year 1992 -1993 Coventry, England

## EXPERIENCE

### CASTLING GROUP New York, NY

E-business incubator that creates and builds Internet businesses. Castling provides business strategy, infrastructure design/implementation, investment capital, and interim management.

*Manager - Operations* Summer 2000

- Developed marketing objectives and metrics to evaluate the customer experience for the B2B venture of the world's largest sourcing company. Completed customer targeting, segmentation, and sales lead compilation for the venture.
- Wrote the business plan, developed financial forecasts, and created competitive analyses for an internally generated B2B play.
- Created a formal review process for business plans and evaluated potential business partners.

### DONALDSON, LUFKIN & JENRETTE Dallas, TX

*Financial Analyst - Investment Banking* 1997-1999

- Designed comprehensive financial models and performed financial analyses of debt offerings, equity offerings, leveraged buy-outs, mergers and acquisition transactions and merchant banking investments.
- Developed marketing presentations and memoranda which addressed business strategy, financial strategy, and company, industry and macroeconomic conditions for delivery to public investors, internal sales force, rating agencies and clients.
- Interacted extensively with senior client management, attorneys, accountants, co-managing bankers and others to coordinate the execution of transactions.
- Responsible for the ongoing training of junior analysts. Participated in recruiting efforts.

### PRINCIPAL FINANCIAL SECURITIES (acquired by EVEREN Securities 12/97) Dallas, TX

*Financial Analyst - Investment Banking* 1996-1997

- Created and participated in presenting new business presentation to potential clients.
- Gained initial exposure to corporate finance transactions including equity offerings, takeover defense plans and merger and acquisition advisory assignments involving small-capitalization companies in the healthcare industry.
- Identified new business opportunities for the healthcare group through industry research.
- Negotiated and managed all financial database and on-line services for the investment banking group.

### ARTHUR ANDERSEN LLP Chicago, IL

*Consultant - Economic and Financial Consulting Group* 1994-1996

- Performed financial and operational analysis for assignments in Litigation Consulting, Fraud Services and Environmental Services.
- Executed valuation analyses for assignments involving breach of contract/lost profits claims, real estate investments and insurance litigation settlements.
- Supervised staff and administered performance reviews. Responsible for up to five consultants per project.

## ADDITIONAL INFORMATION

Interests include skydiving, scuba diving, golf, skiing, basketball, running, and traveling.

## ERIC M. CONKLIN

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Philadelphia, PA 19103  
215-640-0613  
[Eric.Conklin.wg01@wharton.upenn.edu](mailto:Eric.Conklin.wg01@wharton.upenn.edu)

### EDUCATION

**THE WHARTON SCHOOL, University of Pennsylvania** Philadelphia, PA  
Master of Business Administration Candidate May 2001  
Major in Finance  
*Awarded First Year Honors*

**HAMILTON COLLEGE** Clinton, NY  
Bachelor of Arts in Economics, minors in Government and Psychology May 1993  
Graduated *Magna Cum Laude*, member of **Phi Beta Kappa**  
Omicron Delta Epsilon – International Honors Society of Economics  
Psi Chi – National Honors Society of Psychology

### EXPERIENCE

**FIRST RESERVE CORPORATION** Greenwich, CT  
Summer Associate Summer 2000  
*First Reserve is the leading private equity firm specializing in the energy industry. The firm has invested over \$1.5 billion in more than 50 platform companies and completed over 150 add-on acquisitions over the past 20 years.*

- Performed due diligence on potential acquisitions including financial modeling, company research, management meetings, and industry studies. Modeled merger strategies for an existing portfolio company.
- Conducted analysis and drafted sections for the firm's forthcoming Fund IX \$800 million Private Placement Memorandum.

**THE BANK OF NEW YORK** New York, NY  
Assistant Treasurer and Account Officer, *Energy Industries Division* 1997-1999

- Managed 21 credit relationships as a member of a two-person team with commitments totaling \$1.8 billion and annual revenue of over \$7.7 million (increasing at 14% per year from 1997). In final 12 months, recorded new interest income of \$837,000 and securities processing incremental income of \$1.4 million (marketed both credit and non-credit products); awarded 3 new Agent positions and 3 new Co-Agent positions.
- Performed extensive financial modeling (pro-forma, projections, sensitivity analysis, deal structuring).
- Provided written and oral credit committee presentations to senior bank staff detailing the client company, the risks, and the structure of the proposed transaction.
- Trained and mentored post-MBA energy associate staff.
- Project finance experience includes Transocean Offshore's construction of the \$332 million Enterprise deepwater drillship; acquisition experience includes GPU Australia's \$1.9 billion purchase of PowerNet (the electric transmission grid in Victoria, Australia).
- Credit training: Strobble and Associates nine-month accounting and financial statement analysis course (ranked first in the class). Received one-on-one cash flow modeling instruction.
- Division coordinator for annual United Way campaigns (exceeded contribution goal by over 20%).

**JMI, INCORPORATED** (family-owned, plastics manufacturing firm) Canastota, NY  
Member of Management Team 1993-1996

- Worked in start-up phase of injection molding plastics business specializing in custom, limited-run products for clients ranging from the automotive industry to the restaurant supply industry.
- Learned entrepreneurial work ethic and developed leadership skills as business experienced growth; at peak, running 8 plastic presses with 3 shifts of employees and annual revenue of \$500,000.
- Involved in all stages of manufacturing plant operations (from administration to equipment operation).

### ADDITIONAL INFORMATION

Avid mountain biker, Indy Car Racing fan, Recipient of Cohort G "Best Impersonation of a Professor Award".

**JENNIFER M. COONEY**  
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## EDUCATION

### **THE WHARTON SCHOOL, University of Pennsylvania**

Philadelphia, PA

*Master of Business Administration Candidate* - May 2001

- Major in Finance
- Sales and Trading Club, Private Equity Club, Entrepreneur Club
- Awarded Catherine D. Sharpe Memorial Fellowship

### **VILLANOVA UNIVERSITY**

Villanova, PA

*Bachelor of Science in Business Administration*, Major in Finance - May 1995

- Summa Cum Laude, Cumulative G.P.A. - 3.95/4.0
- Rankin Major 3/164, Rankin Class 10/597
- Awarded the Thomas J. Watson (IBM) Memorial Scholarship
- Awarded Villanova University Academic Scholarship

## EXPERIENCE

### **GOLDMANSACHS & CO**

New York, NY

*Summer Associate - Fixed Income Currency & Commodities Division* - Summer 2000

- Focused on eight desks within the division, including foreign exchange, commodities, high yield, investment grade bonds and interest rate products sales
- Participated in daily classes covering specific products and market dynamics
- Created and delivered presentations/sales - pitches to Goldman professionals and other summer associates
- Developed sales and trading skills through cold calls and trading simulation exercises

### **FARRELL MARSH & CO**

Ardmore, PA

*Associate* 1997 - 1999

- Acted as placement agent to raise institutional capital for private equity funds
- Qualified and met with potential clients to determine portfolio allocation and investment objectives
- Answered Requests for Proposals from institutional investors and their consultants
- Facilitated meetings between clients and fund sponsors
- Performed extensive market research to create presentation material to educate clients on marketplace
- General Securities Representative Licenses - Series 7 and Series 63

### **ANDERSEN CONSULTING**

Philadelphia, PA

*Consultant* 1995 - 1997

#### **Client Responsibilities**

- Established on-going processes to facilitate continuous improvement in service quality for large commercial bank
- Crafted Operations Level Agreements as a tool to specify requirements for operational services and resources
- Built and maintained database to determine bank's current application coverage and suite
- Designed, coded, tested and documented asset management firm's custom programming requests - including new developments, modifications, enhancements and bugs

#### **Firm Responsibilities**

- Developed and implemented "New Hire Packet" to enable new hires to become more easily acclimated to company culture and the geographical area. Is currently firm standard orientation material for 15 regional offices
- Acted as recruiting liaison between firm and Villanova University by coordinating company information sessions, delivering group presentations and assisting in the interview process

## ADDITIONAL INFORMATION

- Civic activities include Ronald McDonald House Volunteer, Toys for Tots and the Wharton Jingle Bell Charity Run
- Additional interests include reading suspense novels and spinning

**BRIAN COTTER**  
1500 Chestnut Street Apt. 12F  
Philadelphia, PA 19102  
215.523.6295  
[cotterb@wharton.upenn.edu](mailto:cotterb@wharton.upenn.edu)

## EDUCATION

### **THE WHARTON SCHOOL, University of Pennsylvania**

Philadelphia, PA

*Master of Business Administration Candidate*

May 2001

- Major in Information: Strategy, Systems, and Economics
- Member: Consulting Club, Technology Club, E-commerce Club

### **BRYANT COLLEGE**

Smithfield, RI

*Bachelor of Science*

May 1995

- Major in Finance; Magna Cum Laude; Ranked in top 3% of class

## EXPERIENCE

### **BAIN & COMPANY**

Dallas, TX

*Summer Consultant*

June-August 2000

- Conducted a growth opportunity analysis for a leading media company by analyzing market size, competitive environment and cost structure of proposed market.
- Developed a presentation for investors of an Internet services company that was used to secure financing.

### **DIRECTADVICE.COM**

Hartford, CT

*Strategic Planning Analyst*

May-June 2000

- Conducted a depth market analysis, identified key competencies and evaluated strategic fit of several potential partnership opportunities.
- Developed a proposal for two prospective partners, forecasting revenues and specific operational approach, which was later used in implementing the partnership.

### **FIDELITY MANAGEMENT AND RESEARCH, FIXED INCOME DIVISION**

Dallas, TX / Merrimack, NH

*Trader*

1998-1999

*Assistant Trader*

1997-1998

- Key member of portfolio management team that managed the cash portion of all of Fidelity's equity, bond, and money market funds.
- Invested between \$10 billion and \$40 billion daily in repurchase agreements (repos) as one of two traders for the world's largest buy-side operation.
- Developed new liquidity and risk strategies for the firm in conjunction with Fidelity's credit and quantitative analysts to minimize shareholder risk.
- Spearheaded development of several new investment products to generate higher shareholder returns, coordinating efforts of credit, legal, trading and management to facilitate the process.

### **FIDELITY BROKERAGE SERVICES**

Boston, MA / Merrimack, NH

*Team Leader / Senior Trader*

1996-1997

- Supervised trading activities for top-performing team of fourteen registered trading representatives.
- Led daily and weekly meetings involving division team to improve productivity and promote team building.
- Implemented formal feedback process to improve knowledge management throughout the division.

*Fixed Income Specialist*

1995

- Maintained twice the trading productivity and one-eighth the error rate of the division average.
- Developed and led monthly presentations to educate colleague and client groups with regard to fixed-income securities.

## ADDITIONAL INFORMATION

- Volunteering: Amnesty International, Undergraduate Mentor Program, Christmas in April
- Interests: basketball, running, martial arts

## JILL S. COWAN, CPA/MBA

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New York, NY 10028

(212) 472-4410  
jill\_cowan@yahoo.com

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### EDUCATION

**THE WHARTON SCHOOL, University of Pennsylvania**  
**Master of Business Administration in Finance and Marketing**

Philadelphia, PA  
May 2001

- Advertising Manager, *The Wharton Journal*
- Member of Finance Club, Admissions Committee, Wharton Community Consultants, and Christmas in April

**MIAMI UNIVERSITY**

**Bachelor of Science in Accounting, Magna Cum Laude**

Oxford, OH  
May 1994

- Studied abroad at the Miami University Dolibois European Center in Luxembourg
- President, Honors Community Development Committee

### PROFESSIONAL EXPERIENCE

**MCKINSEY & COMPANY**

*Associate*

Stamford, CT  
Summer 2000, 2001-present

- Analyzed business trends and performance across product lines and channels for a leading consumer goods company. Identified potential opportunities to increase revenue and reduce costs. Quantified financial impact of alternative strategies. Presented ideas for capturing opportunity to company management.
- Developed a financial model to monitor and analyze the operating results of different business units using key performance indicators. Identified and explained variances from forecast to actual. Implemented a new budgeting process and monthly reporting procedure for both US and international operations.
- Conducted a financial and operational review of the sales force for a large high tech company. Analyzed revenue, cost and profitability trends across divisions. Identified multiple strategies to improve sales force effectiveness, including preparation of financial models to estimate the present value of each strategy.
- Prepared a consumer demand analysis for paper goods in a retail study designed to reduce mismatches between product supply and demand. Identified specific cost-saving opportunities.

**ARTHUR ANDERSEN LLP**

*Corporate Finance/Tax Manager*

Chicago, IL  
1994-1999

- Promoted from staff to senior associate to manager within four years.
- Selected as first manager to participate in six-month exchange program with the Sydney, Australia office.

**Business and Financial Advisory**

- Assisted U.S. multinational company with European expansion including: a reorganization of its UK operations, a French acquisition, and establishment of its European headquarters in the Netherlands. Analyzed the domestic and international tax consequences of the transactions. Constructed models to forecast net earnings and cash flow.
- Performed financial and tax due diligence related to a potential acquisition of hotel properties located worldwide. Reviewed historical and projected financial statements. Utilized cash flow modeling and forecasting techniques to analyze various acquisition structures. Prepared risk analysis and advised client on final bid offer.
- Prepared and reviewed federal, state, and local tax returns and estimated tax payments. Represented numerous clients before the Internal Revenue Service and various state tax jurisdictions.
- Negotiated and managed annual fees on client engagements. Budgeted time and expenses to ensure profitability.

**Leadership and Teamwork**

- Supervised, trained and mentored 15 junior staff members on various client engagement teams.
- Served as instructor for new staff members at Arthur Andersen's worldwide training center.
- Participated on both *Mergers and Acquisitions* and *International Corporate Transactions* Teams.

### ADDITIONAL INFORMATION

- Certified Public Accountant, placed among top 150 candidates nationally on 1994 CPA Examination.
- Co-founder and site coordinator of the *City-Wide Tax Assistance Program* for disadvantaged families in Chicago.
- Advanced computer skills, including Microsoft Excel, PowerPoint, and Access.
- References furnished upon request.

**THOMAS DAVASIA**

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Philadelphia, PA 19102  
(215) 875-8004

Thomas.Davasia.wg01@wharton.upenn.edu

**EDUCATION**

**THE WHARTON SCHOOL, University of Pennsylvania**  
**MBA Candidate - Dual Major in Finance and Marketing**

Philadelphia, PA  
May 2001

- Selected a sMarketing Fellow for the Wharton Global Consulting Practicum to coach teams working on the development of market entry strategies; appointed Teaching Assistant for Introduction to Marketing Strategy
- Developed US market entry strategy for optical wireless communications company
- Wharton Finalist- A.T. Kearney eCommerce Consulting Challenge
- Tech Times Editor; Placed in 99th percentile of GMAT, GRE

**THE UNIVERSITY OF TEXAS AT AUSTIN**  
**Master of Science in Mechanical Engineering**

Austin, TX  
August 1995

- Project: Critical Success Factors for Small Businesses, with The Quality Management Consortium
- Selected as Research Assistant in Mechanical Engineering and Finance Departments

**THE SARDAR PATEL COLLEGE OF ENGINEERING, University of Bombay**  
**Bachelor of Engineering in Mechanical Engineering**

Bombay, India  
May 1993

- Cultural Representative of Student Union, Organized funding for inter-college competition

**EXPERIENCE**

**BAIN & COMPANY**  
**Summer Associate**

Summer 2000

*Mergers, Acquisitions and Divestitures*

- Conducted valuation analyses for a client seeking to expand into adjacent businesses
  - Interviewed company management, performed due diligence; evaluated financial and operational synergies
  - Developed valuation indication and integration models for different merger scenarios
  - Developed an offer/negotiation strategy for client executives
  - Recommended pilot sites for concept testing and designed operational metrics to measure synergies

**DELOITTE CONSULTING**  
**Consultant**

Detroit, MI  
1997 – 1999

*Mergers, Acquisitions and Divestitures*

- Member of Program Management Office overseeing spin-off of a \$24 billion automotive components division
  - Developed negotiation strategy to minimize expected \$25 million financial impact of software license transfers
- Strategy Development and Knowledge Transfer*
- Supported authors of *The Power of Corporate Kinetics* – an enterprise transformation business publication. Developed transition imperatives for companies in the manufacturing sector
  - Designed program attributes to accelerate new product introduction for a automotive client. Recommended initiatives resulting in reduction of cycle time and development costs by 20% -25%

**LUCAS BODY SYSTEMS**  
**Supply Chain/Manufacturing Engineer**

Fenton, MI  
1995 – 1997

*Product Launch Experience*

- Developed manufacturing and supply chain strategy for a \$2 million product line for the automotive security market
- Implemented recommendations for project location after reevaluating plant capabilities in six North American facilities

*Lean Manufacturing Experience*

- Identified profitable products using Activity Based manufacturing model
- Reduced inventory levels in supply chain and assembly process, resulting in 16% improvement in lead-time
- Implemented rapid feedback of quality problems, leading to higher yields (97% improvement) during transition from prototype to high volume manufacturing

**ADDITIONAL INFORMATION**

- Hobbies: World history, writing, investing, running and racquetball

**KEVINMICHAELDAVIS**  
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## EDUCATION

- TheWhartonSchool,UniversityofPennsylvania -Philadelphia,PA.** **May2001**  
**MasterofBusinessAdministrat ionCandidate** ,FinanceMajor.  
Co-Chair,2000WhartonFinanceConference.FinanceClub,Mergers&AcquisitionsClub.  
ElectedasCohortAlumniAffairsRepresentative.
- UCLASchoolofLaw -LosAngeles,CA.** **May1994**  
**AwardedJurisDoctorDegree** .  
MootCourtHonorsProgram.StaffEditor,FederalCommunicationsLawJournal.
- UniversityofNorthCarolina -ChapelHill,NC.** **May1991**  
**AwardedBachelorofArtsDegreewithHonorsinEconomics.**  
Dean'sList,1989to1991.3.7GPAinMajor.Complete dEconomicsHonorsThesisusingregressionanalysis.  
President,KappaAlphaPsiFraternity.Member,DeltaOmicronEpsilonEconomicsHonorFraternity.  
Recipient,OutstandingSeniorAward.

## EXPERIENCE

- MERRILLLYNCH&CO.,INVESTMENTBANKING -SUMMERASOCIATE;NewYork,NY.** **Summer2000**  
*AssumedtheresponsibilitiesofanassociateonfinancingsandM&AdealsintheGlobalMediaGroup.*
  - PerformedDCFvaluation,financialduediligence,andactivelyparticipatedindraftingtheprospectusforWildblue Communications,a\$2.0billionInternetbroadbandcompany.
  - Analyzedstrategicalternatives,identifiedacquisitioncandidates,andpreparedcomparablecompanyanalysisforapitchto TaylorNelsonSofres,amajormarketingresearchfirm.
  - Preparedapresentatio nfortheNewsCorporationanalyzingthesatellitetelevisionmarketintheUSandthemajorplayers.
  - AssistedinpreparingaroadshowpresentationfortheIPOoftheNewsCorporation'ssatellitetelevisionassets.
- U.S.SENATORJACKREED -BANKINGLEGISL ATIVEASSISTANT/COUNSEL;Washington,DC.** **1997-1999**  
*AdvisedandprovidedlegalcounseltotheSenatoronissuesbeforetheSenateBankingCommittee.*
  - Researched,analyzed,anddraftedlegislationrelatedtoGlass -Steagallrepealandfinancialregulatory reform.
  - ConductedmeetingswithseniorstafffromtheFederalReserve,theWhiteHouse,andTreasuryDepartmentto formulateandanalyze policy.
  - PreparedtheSenatorforandactivelyparticipatedinmeetingswithCEOsandbankersregardinglegislation.
  - Frequentlygavepresentations,deliveredspeeches,andparticipatedinpaneldiscussionsbeforebankers.
- U.S.REP.MELVINWATT -BANKINGLEGISLATIVEASSISTANT/COUNSEL;Washington,DC.** **1995-1997**  
*AdvisedandprovidedlegalcounseltotheCongressman onissuesbeforetheHouseBankingCommittee.*
  - Researched,analyzed,anddraftedlegislationandpolicyproposalsrelatedtoGlass -Steagallrepeal,federaldeposit insurancereform,andreformstotheFederalHomeLoanBanksystem.
  - Frequentlygavepresentat ionstobankersandlobbyistsregardingbankinglegislation.
- U.S.HOUSEOFREPRESENTATIVES -CONGRESSIONALFELLOW;Washington,DC.** **1994-1995**
  - Researched,analyzed,anddraftedlegislationrelatedto comprehensiveregulatoryreform.
  - BriefedCongressme nforupcominghearingsanddebate.
- U.S.DEPARTMENTOFJUSTICE,CIVILDIVISION -EXTERN;Washington,DC.** **Fall1993**
  - ParticipatedinresearchinganddraftingbriefstotheSupremeCourtandcourtsofappeal.

## ADDITIONALINFORMATION

- President,SenateB lackLegislativeStaffCaucus(1998).
- WeeklyPanelist/Host,“Youngbloods”TelevisionShow,America'sVoiceNetwork(1996 -1998).
- SummerAssociate,NAACP LegalDefenseandEducationalFund(Summer1993).
- EnjoyCreole/Cajuncooking,music,andfitness.

**MARCO CESAR GONCALVES FERREIRA FREITAS**

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**EDUCATION**

**THE WHARTON SCHOOL, University of Pennsylvania**

Master of Business Administration Candidate: Finance and Strategic Management

Member of Latin American Students Association, Consulting and E-commerce clubs

Philadelphia, PA

May, 2001

**THE JOSEPH H. LAUDER INSTITUTE, University of Pennsylvania**

Master of Arts Candidate, International Studies, Latin America and Spanish concentration

Business, Cultural and Language Immersion at I.T.E.S.M., Monterrey and Mexico City, 1999

Selected interviewer for the Lauder Admissions Committee

Philadelphia, PA

May, 2001

**ESCOLA POLITÉCNICA, Universidade de São Paulo**

Bachelor of Science, Electrical Engineering. Concentration: Energy and Automatization

Elected Sports Director of Electrical Engineering Students League

São Paulo

1990 – 1994

**EXPERIENCE**

**THE BOSTON CONSULTING GROUP**

**Consultant**

- Led the Spanish part of an European B2C internet venture implementation, negotiating deals with portals and ad spacesellers, developing the marketing campaign and site development, among other tasks
- Assessed market opportunities for a leading retail bank to explore the potential sales of nonfinancial products through its channels

Madrid

Summer 2000

**THE BOSTON CONSULTING GROUP**

**Consultant**

- Recommended a strategic market segmentation for a major Brazilian retail bank, aiming to reduce attrition and to maximize margins
- Developed an entry strategy for the commercial refrigeration market for the leading multinational home appliance manufacturer and presented results to senior management
- Designed an aggressive growth strategy, targeting a 50% increase in ROE, for a specialized consumer finance company in Brazil in order to face deregulation challenges
- Led on-campus presentations, resume screening and recruiting interviews as the Associate Recruiting Director

São Paulo

1998 – 1999

**ARTHUR D. LITTLE**

**Business Analyst**

- Led a client team of 8 people in the restructuring of customer care area of the credit card division of the largest Brazilian retail bank
- Redesigning the logistic and distribution process in the exploration division of a large oil company in Latin America, resulting in US\$15 million annual cost reduction
- Restructured the organization of one of the largest retail banks in Brazil, contributing to an annual cost reduction of US\$30 million

São Paulo

1996 – 1997

**ALUMINUM COMPANY OF AMERICA – ALCOA, Cable and Accessories Division**

**Sales Engineer**

- Coordinated the preparation of commercial and technical proposals of power systems for Brazil's main utilities
- Managed an annual sales budget of US\$7 million and supervised a sales representative network of 12 people
- Conducted the sales efforts for inventory reduction program, resulting in a 20% stock reduction, receiving "Salesperson of the Year Award" in 1995 due to outstanding sales performance

São Paulo

1993 – 1996

**ADDITIONAL INFORMATION**

- Native Portuguese, fluent English and Spanish (ACTFL: 3 – Superior)
- Swam competitively for Círculo Militar de Campinas (1982 – 1989). Achieving third place in the State Championship of 1987
- Member of Wharton Soccer Team, played on Escola Politécnica Team and led the BCG – São Paulo soccer team
- Enjoys skydiving, photography and traveling

## KEITHE VANDERMAN

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Keith.Derman.wg01@wharton.upenn.edu / kderman@sawmillcapital.com

### EDUCATION

#### The Wharton School

MBA, May 2001

- Major: Entrepreneurial Management (Additional Significant Coursework in Finance and Private Equity).
- Member of WGA Executive Council: Divisional Vice President of Athletics.

Philadelphia, PA

1999-2001

#### Duke University

A.B. Political Science, May 1994 — GPA: 3.5/4.0 (Cum Laude)

- President and Rush Chairman, Sigma Phi Epsilon Fraternity.
- Owner and operator of two profitable business ventures: The Hideaway Bar and The Blue Pages.

Durham, NC

1990-1994

### WORK EXPERIENCE

#### Saw Mill Capital LLC

Independent Consultant, Private Equity

- Evaluate investment opportunities for middle-market buyout firm focused on the global power industry.
- Analyze and assist in structuring of potential transactions while aiding in due diligence process.
- Monitor performance and interact with management of existing portfolio companies.

Briarcliff Manor, NY

Fall 2001 - Present

#### Cross Atlantic Capital Partners (XACP)

Summer Associate, Venture Capital

- Evaluated strategic IT investment opportunities for middle and late stage VC firm focused on the US, UK and Ireland.
- Conducted extensive industry and company specific due diligence for procurement and wireless companies.
- Analyzed operations of Trade Access, a XACP portfolio company, as part of an innovative Wharton summer course focused on current issues in the technology industry. Also prepared reports on synergies within 20 portfolio companies.

Radnor, PA

Summer 2000

#### Sunterra Corporation

Senior Financial Analyst, Acquisition & Development Group

- Worked directly with senior level executives at a public resort company (\$350 MM in sales) on a variety of acquisition, real estate development, business development and capital raising projects.
- Sourced new resort locations and, ultimately, initiated contact and conducted negotiations with existing property owners.
- Performed extensive valuation and pro forma analyses of potential acquisitions.
- Managed due diligence process and coordinated the involvement of internal and external sources on deals.
- Integrated acquisitions into company's portfolio and maintained ongoing relations with operations personnel.
- Executed transactions included: \$45 MM European resort company; \$27 MM South Eastern US resort operator; \$3 MM management company in Mid Western US; \$3 MM marketing company in Florida; \$340 MM in 2 high yield offerings.

San Mateo, CA

1997-1999

#### Brewery Atlantis

Founder & Director of Business Development

- Founded company with plan to establish a vertically integrated, craft brewery operation.
- Responsibilities included governing capital raising process, contacting and soliciting investors, developing business plan and engaging and negotiating with third parties in contemplation of potential investments, alliances and/or joint ventures.

San Francisco, CA

1996-1997

#### Smith Barney Inc.

Financial Analyst, Mergers & Acquisitions

- Worked on a variety of domestic and international transactions for both financial and strategic buyers.
- Performed extensive financial analysis, evaluated strategic alternatives and presented resulting conclusions to internal supervisors and clients' senior management.
- Engagements included mergers, acquisitions, squeeze-outs, leveraged buyouts, recapitalizations, restructurings, spin-offs, joint-ventures, defense analyses and fairness opinions.
- Executed transactions included: Varsity's sale of Hayes Wheels to Motor Wheel (JLL) for \$970 MM, Federated Dept. Stores' \$4 billion bankruptcy acquisition of Macy's, and GranCare's \$190 MM acquisition of Evergreen Healthcare.

New York, NY

1994-1996

### ADDITIONAL INFORMATION

- Proficient in Spanish.
- Interests include live music, golf, travel, skiing, rock climbing, mountain biking, college basketball and the Yankees.

**RAHULDEVGON**  
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### EDUCATION

- The Wharton School, University of Pennsylvania** Philadelphia, PA  
1999 -2001
- MBACandidate.Finance.GMAT750
  - Director's List Fall 1999 and Spring 2000. First Year Honors. TA for Speculative Markets.
  - Member New York Securities Case Competition winning team
  - Vice President, Trading Club. Member Extreme Outdoors Club and UPenn Bike Club.
- Middlebury College** Middlebury, VT  
The French School, total immersion language program. August 1999
- Indian Institute of Management** Ahmedabad, India  
1994 -1996
- PGDM. Air Force Scholarship for academic excellence.
  - Founding Member of Internet Finance Club.
- Institute of Technology, BHU** Banaras, India  
1990 -1994
- B.S.(Chemical Engineering).
  - Winner of the President's Gold Medal (Valedictorian equivalent).
  - Member of Institute Squash Team.

### EXPERIENCE

- Goldman, Sachs & Co.** New York, NY  
*Summer Associate - Fixed Income, Currency and Commodities Division* Summer 2000  
Completed a 7-week rotational program through the Credit Derivatives, Swaps, Foreign Exchange, Commodities, Mortgages, High Yield, Distressed Debt, and Interest Rate Products desks.
- Assisted in a write-up on pricing of the \$14.5 Billion DT issue with a step-up coupon feature.
  - Wrote a product description on first-to-default baskets swaps for the credit derivatives desk.
  - Responsibilities included identifying, analyzing, and presenting trade ideas. Delivered presentations/sales pitches to Goldman professionals and other summer associates.
- Mitchell Madison Group** New York, NY  
*Senior Associate* 1996 to 1999  
Specialized primarily in strategic assignments with focus on clients in financial services. Led joint teams, anticipated staffing needs, built and managed complex work plans and recruited for the firm.
- Assisted in the development of mortgage prepayment probability model for a leading mortgage bank in the country. The study used CART to develop probabilities of prepayment in the future. The project was expected to lead to more efficient mortgage pricing and increase revenue by \$135 Million for the bank.
  - Worked with one of the primary financial institutions in the country to perform a bankruptcy severity analysis on the client's credit card portfolio. The mission concluded with the implementation of proposed strategies and an estimated baseline impact of \$15 Million.
  - Optimized and implemented a currency risk management strategy for a transnational European bank, based out of Paris. Hedging involved the use of derivative products and regression techniques to optimize the number of contracts to be bought and sold.
  - Managed and led a client team of a major U.S. bank in an effort to cut 15% of the purchased expenses on a base of \$50 Million. Identified savings opportunities, increased efficiency in the purchasing process and set up systems to track spending in the future.
  - Performed a market feasibility study for a new product for a market data information provider. Devised launch strategy for the new product and the mode of financing. Worked closely with the client to determine the best capital structure for the financing.

### ADDITIONAL

- CFA Level III candidate. Member of Mensa. Scored 95% in Mathematics Olympiad, 1990
- Fluent in English, Hindi, Punjabi. Conversant in French.
- Climbed Mt. Rakaposhi, Pakistan (25,550 feet). DJed in New York and Miami. Enjoy SCUBA diving

**DIANE DEVILBISS**  
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## EDUCATION

**THE WHARTON SCHOOL, University of Pennsylvania** Philadelphia, PA  
*Candidate for Master of Business Administration in Finance and Marketing Management* May, 2001

- Member Admissions Committee for Wharton Class of 2003 – Graduate Assistant Reader
- Teaching Assistant for Financial Analysis
- Producer of Wharton Follies
- Art Director for the Edge, Wharton's Consulting Magazine
- First Year Honors

**TUFTS UNIVERSITY** Medford, MA  
*Master of Science in Biochemical/Chemical Engineering* November, 1995

**NEW YORK UNIVERSITY** New York, NY  
*Bachelor of Arts in Biology (Magna Cum Laude)* May, 1992

## EXPERIENCE

**MARAKON ASSOCIATES** New York, NY  
*Summer Consultant* 2000

- Developed detailed strategic plan for growth and expansion of a highly profitable business unit of the world's leading electronic agency broker of financial services
- Generated robust valuation model to assess strategic alternatives and presented findings to senior client, which resulted in strong buy - in recommendations
- Managed team to evaluate a \$1.5 billion acquisition opportunity for the client, including assessment of synergies and development of model to value the potential merger
- Performed in-depth marketing and strategic analysis of a major telecommunications services company and presented to a team of senior partners

**MERCK & CO., INC.** West Point, PA  
*Project Engineer, Merck Biologics Pilot Plant Project* 1996-1999

- Supervised the design of key manufacturing areas within a new \$250 million biotechnology facility, which will manufacture all pre-licensed biologics and genetic products for Merck
- Led cross-functional teams of a dozen scientists and engineers to determine functional needs in the facility; translated those needs into a flexible design which was approved by Merck's Capital Project Executive Committee
- Developed a comprehensive operating plan using industry benchmarks - mark and best practices; presented plan to executive director of Vaccine Process Engineering; the plan was implemented
- Hired, trained and managed 5 engineers to start up operations in the downstream processing areas; developed a training plan for newly hired engineers which shortened the learning cycle and increased productivity

*Process Engineer, Merck Research Laboratories and Manufacturing Division* 1995-1996

- Identified and implemented process improvements for the manufacture of children's vaccine, PedvaxHib™, which reduced manual operations and the risk of product failure
- Led the optimization and scale-up effort of several unit operations for the Hepatitis B process, which resulted in a 25% decrease in manufacturing time and a 30% increase in productivity yields

**CYTOGEN CORPORATION** Princeton, NJ  
*Process Engineer* 1994-1995

- Coordinated the start-up of the commercial scale manufacturing of ProstaScint™. Responsibilities included scale-up, technology transfer and cross-training of personnel from other areas
- Responsible for several process improvements in the manufacturing of ProstaScint™, which increased yields by 300% and decreased cost of raw materials by 25%

## ADDITIONAL INFORMATION

Interests include cooking, wine tasting, scuba diving, underwater photography, paper marbling and horseback riding.

## UDAI DHAWAN

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### EDUCATION

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**THE WHARTON SCHOOL, University of Pennsylvania**  
**Master of Business Administration, Major in Finance**

**Philadelphia, PA**  
**May 2001**

- Elected President of Finance and M&A Club – largest club at Wharton with over 700 members

**INSTITUTE OF CHARTERED ACCOUNTANTS OF INDIA**  
**Associate Chartered Accountant (CPA equivalent)**

**New Delhi**  
**May 1996**

- Graduated in top 1% nationwide

**SHRI RAM COLLEGE OF COMMERCE, Delhi University**  
**Bachelor of Commerce, Concentration in Business & Finance**

**New Delhi**  
**May 1993**

- Honors List; President Sports Council

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### EXPERIENCE

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**JPMORGAN H&Q**

**San Francisco, CA**

**Associate – Technology Investment Banking**

**Summer 2000 & Sept. 2001– Apr. 2002**

- Conducted financial and strategic analyses for several potential merger & acquisition transactions. This included assessing competitive landscape, strategic fit, valuation considerations, tax & legal issues and post-transaction market impact.
- Participated in the IPO process of Endwave Corporation (ENWV), a leading broadband wireless subsystems manufacturer - attended drafting sessions, performed transaction analyses, and assisted in the due diligence process.
- Reviewed alternative financing considerations for companies in relation to the current equity-linked market and advised on capital restructuring options including issue of convertible bonds, undertaking interest rate swaps and overall liquidity management.
- Evaluated private equity placement opportunities for companies including Private Investment in Public Entities (PIPEs) and advised on key considerations, transaction types, investor characteristics, market appetite and overall process & timing.
- Researched and analyzed the Voice over IP industry to assess investment opportunities. Presented results to JPMorgan Partners' worldwide Investment Committee.
- Served as key member of strategic internal consulting team with the objective of increasing JPMorgan's revenues by cross marketing the bank's different product offerings - recommendations resulted in several client wins.

**INVERNESS CAPITAL PARTNERS**

**Wayne, PA**

**Associate - Private Equity (Part-time)**

**Sept. 2000 – May 2001**

- Responsible for screening business plans, evaluating investment opportunities and developing investment thesis. This included conducting market research, evaluating business model sustainability and assessing key strategic & financing risks.
- Participated in all aspects of deal execution including company and management due diligence, return sensitivities and transaction structuring. Worked on investments in wireless media and supply chain planning space.
- Assisted senior partners in guiding management teams of portfolio companies and defining their strategies.

**ARTHUR ANDERSEN CORPORATE FINANCE**

**Bombay & New Delhi**

**Senior Consultant – Mergers & Acquisitions**

**Sept. 1996 – Aug. 1999**

- Led a team of consultants to execute several middle market M&A transactions. Created detailed financial merger models including contribution & accretion/dilution analyses and trading & transaction comparables.
- Drafted confidential selling and deal closure memoranda and facilitated due diligence processes through plant visits and management interviews. Negotiated transaction structures, purchase terms and key legal agreements.
- Evaluated transaction opportunities in several industries including telecom, food, lubricants and apparel. Designed proposals, prepared strategic alternative analyses and participated in presentations to potential clients.
- Worked with a team of senior consultants to analyze the \$350+ billion Indian economic environment and author the publication 'India Means Business' – over 2,000 copies were distributed to Fortune 500 companies and foreign governments.
- Recognized as one of the 'top' deal originators and given nation-wide responsibility for identifying M&A opportunities in retail and consumer goods sector. Generated three mandates in 1998-1999 with total deal size of \$60 million.

**ARTHUR ANDERSEN & CO.**

**New Delhi**

**Consultant – Tax & Business Advisory**

**May 1993 – Aug. 1996**

- Responsible for planning & structuring cross-border investments, conducting tax treaty analyses, and providing comprehensive legal advice to several multinational companies including Microsoft, Toyota, Equifax, Oracle and RR Donnelley.
- Assisted in managing CMS Energy's \$100 million investment in India. Formulated entry strategy, structured investments and provided regulatory advice and legal support leading to transaction closure.
- Analyzed the financial & accounting impact of several M&A transactions and recommended strategies to minimize taxation. This included advising on the merger of Ciba-Geigy with Sandoz and spin-off options for Ciba's specialty chemicals business.
- One of the few employees in India practice to have received 'outstanding' evaluations consistently over three years. Promoted a year earlier to lead four staff consultants. Selected as instructor in Andersen's national training programs and speaker in the company's key recruiting events.

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### ADDITIONAL INFORMATION

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- Co-founded and operated an \$80,000 garment retail business while pursuing undergraduate degree.
- Selected by International Finance Corporation (IFC) to be part of Wharton student team to develop a strategy for its venture investments in India.
- Hiked 14,000 feet in the Himalayas; Enjoy white-water rafting, golf and running.

**BENJAMIN J. DORANZ, PH.D.**  
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## EDUCATION

**THE WHARTON SCHOOL, University of Pennsylvania** 1999-2001  
**MBA Candidate, Health Care Management and Entrepreneurship** Philadelphia, PA

- 1<sup>st</sup> place Wharton Marketing Strategy competition, 1<sup>st</sup> place Wharton Business Plan competition (team advisor)
- Ford Research Fellowship, Director's Honor List (top 10% of class)
- Chair Logistics: New Ventures in Health Care Conference, Community Consulting, Entrepreneurship club
- Co-founder and Treasurer: Scientific Careers Outside Academia (SCOA) cross-disciplinary seminar series
- Co-founder and Wharton representative: Penn Biotechnology Group (PBG) science and business student organization

**BIOMEDICAL GRADUATE STUDIES, University of Pennsylvania** 1994-1998  
**Ph.D., Cell and Molecular Biology** Philadelphia, PA

- Thesis: Chemokine Receptors as HIV Coreceptors
- Howard Hughes Medical Institute Predoctoral Fellowship, Winegrad 1998 Outstanding Dissertation Award, National Council of Graduate Students Finalist (in top five dissertations nationally)

**CORNELL UNIVERSITY, College of Arts and Sciences** 1988-1992  
**Bachelor of Arts, Biology and Psychology** Ithaca, NY

- Graduated Summa Cum Laude, College Scholar, Hughes Research Scholar, Phi Beta Kappa

## EXPERIENCE

**PORT OF TECHNOLOGY, University City Science Center** 2000-present  
**Associate Director** Philadelphia, PA

- Founding management team of 250-seat business incubator/accelerator with support for IT, internet, and biotechnology
- Director of Port Biotech Facilities, 8000 ft<sup>2</sup> of wet-lab space capable of housing 6-8 biotech start-ups
- Screening of business plans, facilitation of business creation, coordination of Port intern program

**CENTER FOR TECHNOLOGY TRANSFER, University of Pennsylvania** 1998-2000  
**Business Development Analyst** Philadelphia, PA

- Preparing business proposals based on Penn biomedical technologies for venture capital financing and recruitment of entrepreneurs. Two technologies successfully being formed into startups.
- Identifying commercial potential of research projects by performing inventor interviews and technology overviews

**Marketing Specialist**

- Conducted market research, identified and contacted licensing prospects for 12 Penn technologies with 2 successful licenses
- Redesigned technology assessment reviews, streamlined material transfer process, established post-doc recruiting program

**UNIVERSITY OF PENNSYLVANIA MEDICAL CENTER** 1993-1999  
**Post-doctoral Researcher** Philadelphia, PA

- Assenior lab member, set research direction, trained graduate students, supervised lab technician
- Coordinated with biotechnology and pharmaceutical partner to license and use screening assays for drug development

**Graduate Student**

- Led team that discovered CCR5 as the HIV coreceptor: part of *Science* magazine's 1996 discovery of the year, in top 10 most cited biology papers 1996-97
- Published 25 manuscripts, including papers in *Cell*, *Science*, and *Nature*

**Research Technician**

- Institute for Human Gene Therapy, Adenovirus and Cystic Fibrosis research for gene therapy applications

**CEDRIC DUCHAMP**  
214 St Mark's Square  
Philadelphia, PA 19104  
215-387-1447  
cedric.duchamp@wharton.upenn.edu

## EDUCATION

**THE WHARTON SCHOOL, University of Pennsylvania** Philadelphia, PA, USA  
MBA Candidate, Major in Finance and Entrepreneurship, First -Year Academic Honors May 2001  
Chairman of the Wharton European Conference, on the steering committee of the Wharton Global Forum  
Wharton International Admission team, Regional Coordinator for Western Europe

**ICAM (Institut Catholique d'Art et Métiers)** Lille, France  
General Engineering Degree 1988 - 1993  
President of the ECHO association (analysis of human resources in Eastern Europe), Sponsoring Manager of the Nuit  
ICAM 91 (major student event - \$150,000 budget), Treasurer of the Black Monday stock trading club.

## PROFESSIONAL EXPERIENCE

**Goldman Sachs International** London, United Kingdom  
**Summer Associate, Investment Banking** Summer 2000

- LVMH Louis Vuitton Moët Hennessy: Worked on valuation and bidding process for the acquisition of the watch business of Vodafone Mannesmann, which included the Jaeger -LeCoultre, IWC and Lange & Sohne brands.
- French multimedia conglomerate: Worked on combined secondary offering and convertible bonds offering. Prepared internal notes on various US technology startups the group was interested in acquiring.
- Pan-European cables service provider: Helped prepare the analysis of acquisitions being considered by the client.

**Microsoft Corporation** Paris, France  
**Senior Program Manager** 1996 - 1999

- Managed French -speaking markets for the Product Development Group (including Quebec and North Africa)
- Market analysis  
Competitive analysis of Internet products. Identification, through focus groups, market studies, and customer visits, of the country -specific needs with regard to the next generations of Internet products. Driving the implementation of new features with development teams in Seattle, USA and in Dublin, Ireland.
  - Delivery of Internet products  
Management of teams, projects, budgets and processes, to produce the French version of Microsoft's Internet products. Based on an outsourcing model, management of the local vendors infrastructure.
  - Leading the resolution of Internet and Intranet security issues  
French government relations, driving of lobbying actions, internal coordination, customer and press relations.
  - Team responsibilities  
Part of an international team of about 50 program managers spread around the globe. Involved in the recruitment and selection of new employees and in the management and development of three trainees.

**Export Software International** Reston, VA, USA  
**Quality Assurance Specialist** September - December 1995

- Driving quality assurance for export processing software
- Design of software development process and tools

**Square D Company (Groupe Schneider)** Raleigh, NC, USA  
**Test Team Lead** 1993 - 1995

- Sent on a two-year mission by mother French company Groupe Schneider to:
- Drive the quality of a product developed by a cross -border team in France, in the USA, and in Japan
  - Participate to the design of the software development process and associated tools
  - Lead the test team (2 to 4 people)

## ADDITIONAL INFORMATION

- Dual US and French citizenship
- Languages: Fluent in French and English, intermediate in German
- Areas of interests: Traveling, tennis, soccer, reading about European and Ancient Egyptian history, jazz, opera.

## OLIVER DUNSCHÉ

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### Education

**THE WHARTON SCHOOL, UNIVERSITY OF PENNSYLVANIA** Philadelphia, PA  
Candidate for Master of Business Administration (MBA) May 2001  
Majors in Finance and Management – Honors: Director's List (Top 10%), First Year Honors, GMAT Top 1%  
Activities: Finance Club, Sales & Trading Club, European Club (Treasurer)

**THE WHARTON SCHOOL, UNIVERSITY OF PENNSYLVANIA** Philadelphia, PA  
Bachelor of Science in Economics (B.S. Econ.) *Summa Cum Laude*, G.P.A.: 3.8/4.0 May 1995  
Majors in Finance and Legal Studies – Honors: Dean's List, Phi Beta Delta

### Experience

**MORGAN STANLEY DEAN WITTER** New York, NY  
*Summer Associate: Fixed Income Division* Summer 2000

#### Credit Derivatives Desk

- Assisted traders in the pricing of asset and default swaps using internal models.
- Constructed a model to estimate default probabilities in loss tranches of credit derivative basket trades.
- Responsible for daily update of all Fixed Income Division traders on default swap levels and trading activity.
- Priced and prepared terms sheets for asset-backed bond offerings swapped into various currencies and bases.
- Created and distributed weekly desk position summary report for monitoring by Credit Research Department.

#### CDO/CBO Marketing & Structuring

- Worked with Structuring, Marketing and Research team to prepare material to market the equity tranche of CDO transactions.
- Participated in Investor and Manager meetings for a variety of new issues.

**DEUTSCHE BANK AG** New York, NY  
*Assistant Vice President: Portfolio Management Group, Global Corporates and Institutions Division* 1997 - 1999

**Portfolio Management:** Proposed transactions to improve the return/risk profile of the commercial lending portfolio.

- Led team to structure and manage a US\$2.5bn cross-border portfolio guarantee transaction.

**Asset Securitization:** Served as member of structuring team for the securitization of the Bank's commercial lending assets.

- Worked on notable US\$5bn Credit Derivative "Synthetic" Collateralized Loan Obligation deal (Deutsche Bank's first).

**Risk Management:** Developed and implemented risk-adjusted performance measurement methodologies (RAROC, VaR).

- Developed and maintained internal RAROC website and education program to provide risk management training to employees.

**Strategic Advisory:** Involved in making strategy recommendations directly to the Deutsche Bank Americas Executive Board.

- Led development and implementation of a risk-adjusted customer profitability system to assist in pre-deal capital approval.

**OLIVER, WYMAN & COMPANY** New York, NY / Singapore, Singapore  
*Associate Consultant* 1995 - 1997

**Market Risk/Asset Liability Management:** Project in Singapore for a major Singaporean bank.

- Worked with team to develop and implement a Value-at-Risk, duration reporting and transfer pricing system.

**Credit Risk Management:** Project in Frankfurt for a major German universal bank.

- Calculated and calibrated expected default frequency, loan loss severity and loan equivalent exposure for the bank's corporate lending assets to allow for the measurement of risk-adjusted return.

**Banking Strategy:** Internal research project.

- Analyzed the relationship between economic and regulatory capital to develop optimal business unit capital usage strategies.

### Additional Information

**Languages:** English (native), German (native), French (proficient).

**Computer Skills:** All MS Office programs, experience with risk/portfolio management models (KMV, Credit Metrics).

**Publication:** "Effective Risk-adjusted Performance Measurement for Greater Shareholder Value," with Sanjeev Punjabi, Ph.D.,  
*Journal of Lending and Credit Risk Management*, October 1998.

**Personal:** Grew up in Germany, South Africa, Brazil, Singapore and the US. Interests include photography, SCUBA and guitar.

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## EDUCATION

**THE WHARTON SCHOOL University of Pennsylvania** **Philadelphia, PA**  
**Master of Business Administration Candidate, Finance** **May 2001**  
Member of Finance and Whala clubs.  
MBA Admissions Coordinator for Venezuela and Central America.

**UNIVERSIDAD METROPOLITANA** **Caracas, Venezuela**  
**Bachelor of Science in Systems Engineering** **May 1992**  
Valedictorian. PDVSA Academic Excellence Scholarship.  
General Manager of Graduation Fund Raising Committee.

## EXPERIENCE

**MORGAN STANLEY DEAN WITTER** **New York, New York**  
**Summer Associate – Private Wealth Management** **Summer 2000**

- Identified the wealthiest twenty individuals in Maracaibo, Venezuela totaling a \$300M opportunity.
- Evaluated investment opportunities in value sectors. Twelve companies were identified.
- Performed a competitive analysis of MSDW's biggest competitors in the ultra-high-net-worth market.
- Researched Neural Networks as a potential technique to offer better investment advice to clients.

**CITIBANK N.A.** **Caracas, Venezuela**  
**Assistant Vice - President** **1998-1999**  
**Management Associate** **1997-1998**

- Coordinated senior management's quarterly analysis of Citibank Venezuela's top corporate customers.
- Managed quarterly analysis of Venezuela's corporate banking industry in terms of market size, products, and services offered by Citibank's competitors.
- Designed and launched a new method to measure the performance of Relationship Managers. Resulted in a thirty percent increase in Citibank Venezuela's overall cross-sell ratio of products.
- Led rightsizing project of Venezuelan operations. Project named by head office as among the best three projects out of sixty in the emerging market division.

**ANDERSEN CONSULTING** **Colombia, Ecuador and Venezuela**  
**Consultant** **1995-1997**  
**Analyst** **1992-1995**

- Maintained day-to-day interaction with high-net-worth individuals who were project leaders including CFO's, CEO's and owners of the top ten banks in Venezuela, Ecuador and Colombia.
- Sold three projects to Andersen Consulting clients totaling fees of up to \$200,000.
- Led the commercial and finance projects of a merger between two savings and loan corporations. Project expected to result in a twenty-three percent reduction in administrative expenses.
- Coordinated the strategic planning for the privatization of a government-owned bank.
- Supervised teams of up to twelve people.

## ADDITIONAL INFORMATION

- Native Spanish speaker.
- Have visited at least thirty different countries.
- Enjoys squash, tennis, new world cuisine cooking and cigars. Beginner golfer.

## CHRIS DYER

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## EDUCATION

### THE WHARTON SCHOOL, UNIVERSITY OF PENNSYLVANIA

Master of Business Administration Candidate in Finance  
Fellow of the Wharton Fellows Fund; active member of the Investment Management and Finance Clubs; Cohort Athletic Representative

Philadelphia, PA  
May 2001

### GEORGETOWN UNIVERSITY

Bachelor of Science, *Cum Laude*  
Concentrations in Russian and International Business

Washington, D.C.  
May 1993

### THE ASSOCIATION OF CHARTERED CERTIFIED ACCOUNTANTS

Certified Diplomat in Accounting and Finance

United Kingdom  
September 1998

## EXPERIENCE

### GOLDMANSACHS ASSET MANAGEMENT

Summer Associate

London  
Summer 2000

- Analyzed equity investment opportunities in the pan-European software industry.
- Performed detailed analysis of six software companies through the evaluation of industry fundamentals, creation of earnings models, valuation analysis, and meetings with senior management teams.
- Presented a formal industry review and investment recommendation to the equity research department, resulting in the purchase of one new holding and the sale of two existing holdings.
- Analyzed and presented recommendations on current and prospective bond issues of Unilever and Pearson.

### PRICEWATERHOUSECOOPERS

Manager

Moscow, Russia  
1995-1999

Corporate Finance

- Prepared the investment memorandum and financial projections that helped to secure a \$1 million investment in a high-tech start-up by an American venture capital fund.
- Performed the due diligence review of a shipping company prior to disbursement of a \$50 million loan.
- Managed the financial review of a publishing company for an American venture capital fund.
- Carried out the due diligence review of a computer distributor on behalf of an American bank.

Management Consulting

- Led the restructuring of a large American retail group's operations in Russia.
- Executed the \$25 million turnaround of a shipping company through assets sales and tight financial control.
- Created a cash flow model and financial management controls and procedures for a Siberian gold mine.
- Developed strategies to implement new financial systems in Russia's national telecommunications company and second largest oil refinery.

### NUCLEAR RESOURCES INTERNATIONAL, INC.

Analyst

Atlanta, Georgia  
1993-1995

- Worked directly with the President of this uranium market consulting and business development firm.
- Created a model of the world uranium market.
- Prepared the business plan and financial model for a Coca-Cola bottling plant in Kyrgyzstan.
- Developed strategy for a Canadian mining company to invest in a Central Asian gold mining operation.

## ADDITIONAL INFORMATION

- Manage personal investment portfolio.
- Survived a winter in the Arctic.
- Fluent in Russian.
- Enjoy SCUBA diving, boating, travel, and golf.

## MUSTAFA EBRAHIM

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### EDUCATION

**THE WHARTON SCHOOL, University of Pennsylvania** Philadelphia, PA  
M.B.A. with Honors 2001

- Concentration in Marketing, Finance and Technology; awarded First Year Honors
- Author of papers entitled "The Future of Distributed Computing" and "Outlook for Wireless Providers in North America."

**RICE UNIVERSITY** Houston, TX  
B.S. Mechanical Engineering, B.A. Economics, cum laude 1995

- Honors Thesis in Economics
- Member of Tau Beta Pi Engineering Honor Society, Omicron Delta Epsilon Economics Honor Society

### EXPERIENCE

**INDEPENDENT STRATEGIC CONSULTING** Toronto, ON  
*Turnaround Strategy for Web-based Solutions Provider* 2002

- Co-leading management team through market mapping and strategic option evaluation exercise
- Developing financial models & option values as part of a comprehensive decision-making framework
- Aggressively profiling players in the market to identify potential acquisition/joint-venture targets

**FANLINK NETWORKS**, Director, Finance & Marketing New York, NY  
*Application Development for Wireless Devices* 2001

- Led team of engineers to design a consumer-facing wireless platform
- Wrote business plan and built financial forecasting model to raise \$1.5M in venture capital
- Created marketing agreements with three largest US wireless firms – Sprint, AT&T & Verizon

**COMPAQ COMPUTER CORP.**, Senior Business Planning Analyst Houston, TX  
*Marketing for Server Products* 1997 – 99

- Developed aggressive marketing plans for field managers in North & South America designed to strengthen Compaq's brand and boost product sales
- Conducted a pricing sensitivity study to determine how Compaq should react to competitor price cuts while maintaining the company's profitability and increasing its market share.
- Created a new marketing strategy and execution plan when Compaq acquired Digital Equipment Corporation (DEC) to exploit DEC's strength in Unix and mainframe systems

**THE BOSTON CONSULTING GROUP**, Associate Management Consultant Chicago, IL & Bombay  
*Market Entry and New Business Launches* 1995 – 97

- Scoped joint venture opportunities for a Swiss equipment manufacturer reentering the Indian market; set up alliances with Indian distributors and end-users to assure rapid market share growth
- Launched a new services business for an automotive equipment client; hired top and mid-level management; integrated field service workforce from two acquired businesses

#### *Brand Development and Product Launch*

- Developed branding strategy for travel industry client based on consumer preference survey and competitor positioning analysis; targeted attractive customer segments with marketing campaign
- Built marketing program and financial model for the launch of a new bath care product expected to triple client's market share

#### *Financial Services Practice Building*

- Identified early trends in internet insurance and banking for financial services players and modeled potential strategic options for major clients
- Conducted training seminars regarding internet insurance and banking for managers and partners in the financial services group at BCG

**NATASHANICOLEEDWARDS**  
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## **EDUCATION**

**THEWHARTONSCHOOL,UniversityofPennsylvania** Philadelphia, PA  
**MasterofBusinessAdministrationCandidate** May2001

- MajorinFinance
- Co-COOandformerDirectorofAlumniRelations,WhitneyM.YoungConference
- GraduateAssistant,AdmissionsCommittee
- ElectedCorporateLiaison,WhartonWomeninBusiness
- Member:African-AmericanMBAAssociation;Finance,European,andSquashClubs
- AwardedMerrillLynchFellowship

**WASHINGTONUNIVERSITY,JohnM.OlinSchoolofBusiness** St.Louis,MO  
**BachelorofScience,BusinessAdministration** May1995

- ProgramLeaderforAlternativeSpringBreakandTeam31Productions(semi-annualcampusconcert)
- WroteathesispaperonthefailedprivatizationoftheUKpostalsystemduringsemesterinLondon,England
- Dean'sListFall1992, Spring1995

## **EXPERIENCE**

**GOLDMAN,SACHS&COMPANY** NewYork, NY  
**SummerAssociate** Summer2000

### *DebtCapitalMarkets:*

- WroteinternalsalesmemoformajorITservicesandconsultingcompany'sdebt offering.
- OrganizedboththephysicalandBloombergroadshowsforaprivatehospitalmanagementcompany'sdebt offering.
- Researchedthegrowinguseof"jumbo"debtissuance(offeringsgreaterthan\$1billion)

### *StructuredFinance:*

- Analyzedandmodeledaportfolioofconsumerloans todeterminefeasibilityforasecuritizationstructure.
- Wrotemarketingmaterialsfornewswapstructure.
- Researchedanddeliveredapresentationoninsurancecompanies'increasingaccesstothecapitalmarketsusingGuaranteedInvestmentContracts(GICs).

**GREENWICHNATWEST(NationalWestminsterBankPLC)** Greenwich,CT  
**StructuredFinanceAssociate** 1995-1999

### *ProjectFinance:*

- Performedcreditanalysis,duediligence,andcashflowmodelingforproposedtransactionsandbankportfolio. Transactionexperienceincludedprojectsinthepowerandoil&gasindustries.
- ParticipatedasleadAssociateona\$2.6Bnaturalgaspipelinefinancing.

### *LeaseAdvisory:*

- TransactionexperiencegainedinadvisingaUKwaterutilityonthesale/leasebackof\$350Minwastetreatmentfacilities.
- Preparedmarketingpresentationsandinvestmentprospectuses,andmanagedthetransactiondocumentationprocess.

### *ReceivablesFinance:*

- Supportedtheoriginationofpre-exportfinancingsforcommodityproductdeliveries.
- CoordinatedtheUSSyndicationofa\$500MBraziliansoybeanexportfinancing.

### *SpecialSituations:*

- Performedgeneral surveillanceandcreditanalysisfor"WatchList"transactions.
- Assistedinthenegotiation,documentation,andrefinancingorsaleofdistressedcreditsinvariousindustries.

## **ADDITIONALINFORMATION**

- CoordinatedandvolunteeredwithStreetProject'sYoung Explorers,anurbanyouthactivityprograminNewYork(3years).
- Interests:Travel(Egypt,CostaRica,WesternEurope),jogging,salsa/merengue,communityservice,andreading.

**JEROME W. EGAN**  
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## EDUCATION

- The Wharton School, University of Pennsylvania** Philadelphia, PA  
M.B.A. Candidate, Dual Major in Finance and Accounting May 2001
- Member of the Finance Club, Media and Entertainment Club and Wharton Roadrunners
  - Teaching Assistant for MBA Core Finance course
- The New York University School of Law** New York, NY  
J.D., with emphasis on corporate law May 1995
- Graduated in top 10% of class; *New York University Law Review*; Teaching Assistant in core class; Financed 100% of education
- The Pennsylvania State University** University Park, PA  
B.S., with Honors and with Highest Distinction, in Business Administration May 1991  
Minor, with Honors, in Psychology
- Graduated first in class of 2,400 students; 11 Academic Scholarships; Penn State Soccer Team; Financed 100% of education

## EXPERIENCE

- Goldman Sachs & Co., Inc.** New York, NY  
*Summer Associate – Investment Banking Division* May 2000 – August 2000
- Performed financial modeling and valuation analyses of public companies using discounted cash flow, comparable company, and transaction multiple methods
  - Worked on an expected \$7 billion public company sell-side transaction; prepared presentation to board of directors, drafted selling memorandum, and assisted in organizing the auction process
  - Participated in negotiations as an advisor to a major airline analyzing a \$175 million cross-border investment
  - Constructed model for a potential \$750 million recapitalization of a public company with a complex capital structure
  - Member of the Ford Motor Company clients service team, with a majority of time devoted to Ford's \$10 billion recapitalization
- Mesirov Gelman Jaffe Cramer & Jamieson, LLP** Philadelphia, PA  
*Corporate Associate* February 1999 – October 1999
- Structured and executed mergers and acquisitions, including:
    - Acquisition of controlling interest in US Wireless Corporation by 3 venture capital funds
    - Acquisition of controlling interest in Rare Medium Group by Apollo Investment Fund and Bear Stearns
  - Established private equity investment fund with a focus on venture capital transactions
- Simpson Thacher & Bartlett** New York, NY / Los Angeles, CA  
*Corporate Associate* September 1995 – November 1998  
*Summer Associate / Part-Time Associate* May 1994 – May 1995
- Specialized in mergers and acquisitions, including:
    - \$37 billion merger of MCI with WorldCom
    - \$10.4 billion acquisition of PolyGram by Universal
    - \$4 billion sale and restructure of USA Network between Universal and Home Shopping Network
    - \$4 billion bid by KKR for Aetna's Property & Casualty division
    - \$190 million acquisition of controlling interest in Randall's Food Markets by KKR
    - \$8 billion hostile takeover of American Cyanamid Company by AHP
  - Drafted and negotiated documents related to public and private equity and debt financings
  - Advised boards of directors on anti-takeover strategies and proxy contests
  - Re-located to Los Angeles, California in March 1997 to help establish a branch office and build client base

## ADDITIONAL INFORMATION

**Interests/Activities:** Writing television scripts, trying to finish two novels, running marathons, anything outdoors

**STEVEN M. EMPOLITI**  
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## EDUCATION

**THE WHARTON SCHOOL**, University of Pennsylvania Philadelphia, PA  
**Master of Business Administration Candidate**, Director's List May 2001

- Mayer Scholarship Recipient (awarded to top 10% of entering class)
- Admissions Committee Volunteer, GUIDE Mentor Program Volunteer
- Wharton Journal Contributor

**GEORGETOWN UNIVERSITY** Washington, D.C.  
**Bachelor of Science in Business Administration**, Magna Cum Laude May 1991

- Dual Major in Finance and International Management, Overall GPA 3.89
- National Business, Psychology, and Financial Management Honor Societies

## EXPERIENCE

**MCKINSEY & COMPANY** Washington, D.C.  
**Summer Associate** Summer 2000

- Developed a strategy to accelerate the growth and value of portfolio companies for a leading Internet venture capital firm.
- Partnered with several vice presidents to identify services, tools, and resources required to enable business acceleration.
- Designed organizational processes and structures to support business acceleration strategy.
- Created a phased implementation plan to manage the rollout of business acceleration capabilities.

**ANDERSEN CONSULTING** Washington, D.C.  
**Manager** 1992 - 1999

### *Management & Leadership*

- Led a \$2 million project to develop a product lifecycle management methodology for a large pharmaceutical corporation.
- Managed a project to redesign the quality assurance processes of an international pharmaceutical company.
- Supervised multiple cross-functional teams of clients, consultants, and contractors ranging in size from two to ten.
- Earned accelerated promotion to manager.

### *Strategy Development*

- Co-managed a study to measure organizational alignment with newly developed strategy at a Fortune 500 corporation.
- Conducted post-merger integration work during initial phases of a merger between global pharmaceutical organizations.
- Directed an assessment of the multimedia and Internet promotional strategy at a leading pharmaceutical corporation.

### *Organizational Analysis & Design*

- Teamed with client executives to analyze and redesign key Marketing & Sales functions at an international corporation.
- Led a client team in the design of a profitability based decision-making model to replace the existing sales driven model.
- Designed and implemented business processes to integrate two departments of a large pharmaceutical corporation.

### *Communications & Marketing*

- Delivered frequent presentations and recommendations to Andersen partners and executive level client personnel.
- Facilitated numerous focus groups, design sessions, strategy discussions, and other group meetings.
- Participated actively in recruiting initiatives and managed corporate financial relationship with Georgetown University.

## ADDITIONAL INFORMATION

- Selected for Wharton Global Consulting Practicum (to assist Latin American company with expansion in US market)
- Special Olympics volunteer, international travel enthusiast, creative writer, and avid college basketball fan

**RONALD J. EPSTEIN**  
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(215) 546 - 5714  
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## EDUCATION

**THE WHARTON SCHOOL, University of Pennsylvania** Philadelphia, PA  
M.B.A. Candidate, Major in Finance May 2001  
• Director's List, First Year Honors  
• Leadership Fellow, Wharton Wildmen Hockey, Wharton Community Consultants, Teaching Assistant

**DUKE UNIVERSITY** Durham, NC  
Doctor of Philosophy in Mechanical Engineering May 1996  
• NASA Langley Aerospace Fellow, Developed aerospace technology for both industry and NASA

**L'INSTITUT VON KÄRMÄNDE DYNAMIQUE DES FLUIDES (NATO)** Brussels, Belgium  
Post-Graduate Degree, Aeronautics and Aerospace, Highest Honors June 1992

**DUKE UNIVERSITY** Durham, NC  
Master of Science, Department of Mechanical Engineering and Materials Science June 1991

**SKIDMORE COLLEGE** Saratoga Springs, NY  
Bachelor of Arts, Mathematics, College Honors (Magna Cum Laude), Honor in Mathematics May 1989

## EXPERIENCE

**MERRILL LYNCH & CO.** New York, NY  
**Summer Associate** Summer 2000  
• Rotated through Equity Research, Fixed Income Research, and Fixed Income Sales and Trading.  
• Wrote several sections of a published Equity Research report on investing in the Commercial Aerospace Sector.  
• Discussed business plans and financial projections with senior management of covered firms.  
• Analyzed and presented recent trends in the global debt market to the Global Chief Fixed Income Strategist.  
• Made strategic recommendations to senior management regarding new business development in electric and petroleum trading.  
• Advised CEO of a \$2 billion chemical company on strategies to mitigate FX risk of an international acquisition.

**THE BOEING COMPANY** St. Louis, MO  
**Project Engineer, Phantom Works, Applied Aerodynamics Technology** 1997-1999  
• Identified key technological synergies of the Boeing Company/McDonnell Douglas Corporation merger.  
• Developed and presented strategic business plans for executive management.  
• Led cross corporation multidisciplinary team that successfully developed and implemented innovative strategies focused on reducing product design costs by 50%.  
• Managed research and development activities supporting advanced aircraft design programs including: Joint Strike Fighter, F/A-18 Hornet, F-15 Eagle.  
• Successfully negotiated 5 joint ventures with California Institute of Technology and small high tech firms.  
• Won research contracts in excess of one hundred thousand dollars for engineering tools and methods development.  
• Led aeroacoustic analysis software development team and produced tools for aircraft design applications.  
• McDonnell Aircraft and Missile Systems Teammate of Distinction Award (1997)  
• McDonnell Douglas Corporation Innovative Research and Development Award (1997)

**WASHINGTON UNIVERSITY** St. Louis, MO  
**Adjunct Professor, Department of Mechanical Engineering** 1997-1999  
• Taught courses and developed curriculum in the areas of aerodynamics, fluid dynamics, & control systems.

**DUKE UNIVERSITY** Durham, NC  
**Research Assistant Professor, Department of Mechanical Engineering** 1996-1997  
• Led research team focused on developing reduced cost computational methods for industrial applications.  
• Published 12 journal articles and presented 25 papers at national/international conferences.

**Office of Student Development, Residential Area Coordinator and Residential Advisor** 1990-1996

## ADDITIONAL INFORMATION

Interests: Travel, Hockey, Investing, Water Polo, Writing/Publishing, Running, Equestrian Activities

**ELIZABETH C. EVERETT**  
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## EXPERIENCE

### **MERRILL LYNCH & CO., INC.**

New York, NY

#### **Associate, *Private Equity Group***

Summer 2000; September 2001 – November 2001

- Instrumental team member in the origination of over \$5 billion of private equity, including:
  - Hicks, Muse, Tate & Furst Equity Fund V, L.P. (\$4.5 billion target)
  - Electra European Fund LP (€750 million target)
  - UCL Asia Ventures, L.P. (\$150 million target)
  - \$30 million Series B Preferred Stock for leading Internet-based Commercial Real Estate Information Provider
- Drafted and prepared private placement memorandums, investor presentations, and due diligence materials
- Developed market positioning, including prioritization of investor meetings, and managed investor meeting logistics, due diligence, and follow-up, facilitating continuous feedback on investor's interest level and issues
- Interacted extensively with General and Limited Partners, including pension funds, insurance companies, fund of funds, endowments, foundations, and high net worth individuals
- Completed eight-week global associate training program

### **SALOMON SMITH BARNEY**

New York, NY

#### **Financial Analyst, *Automotive/Industrial Investment Banking***

July 1997 – July 1999

- Provided corporate finance solutions to automotive/industrial clients as an integral team member
- Completed lead-managed transactions including:
  - \$605 million sale of CMI International to Hayes Lemmerz International
  - \$120 million 144A high yield offering for Talon Automotive Group
  - \$30 million Series B high yield offering for MSX International, Inc.
- Created integrated financial models and pro forma analyses to assess earnings, capital structure, and cash flow impact of various strategic and financing alternatives
- Performed valuation analyses, including DCF, comparable company, precedent transaction, and comparable credit analysis
- Managed due diligence processes and drafting sessions including competitive auction buyer process
- Interacted extensively with senior management and financial sponsors, including roadshows and management presentations

### **BERKERY, NOYES & CO.**

New York, NY

#### ***Publishing/Media Mergers & Acquisitions***

Summer 1996

- Marketed offerings through targeted confidential investment memorandums and management presentations
- Identified suitable buyers and assessed their business strategies, competitive operating positions, and ability-to-pay

### **HAUSLEIN & COMPANY**

Greenwich, CT

#### ***Private Investor, Acquisitions & Leveraged Buyouts***

Summer 1995

- Participated in due diligence of potential merger of nation's two largest detention systems aggregators
- Interacted on a daily basis with senior management of portfolio companies, including Sunglass Hut International, Inc.

## EDUCATION

### **THE WHARTON SCHOOL, University of Pennsylvania**

Philadelphia, PA

#### **Master of Business Administration, *Entrepreneurial Management***

May 2001

- Executive Director, Alumni Affairs, Wharton Graduate Association
- South America Global Immersion Program (Buenos Aires, Sao Paulo, Salvador, Rio de Janeiro)
- Co-Chair, Class of 2001 Class Gift Campaign, raised over \$186,000 from 78% of class

### **CORNELL UNIVERSITY, College of Agriculture and Life Sciences**

Ithaca, NY

#### **Bachelor of Science, *Applied Economics and Business Management***

May 1997

- Dean's List; 3.4 GPA; Four-Year Cornell Tradition Fellow
- Cornell Tradition Senior Recognition Award, honoring 12 seniors for their work ethic, leadership, and service to Cornell
- Vice Chair, Class of 1997 Class Gift Campaign, set records for participation (51%) and dollars raised (over \$80,000)

## ADDITIONAL INFORMATION

- NASD Series 7 and Series 63 registered
- Region Chair (Philadelphia and Metro New York), Cornell University Ivy Society, Young Alumni Leadership Giving
- Board Member, Cornell University Fraternity and Sorority Affairs Advisory Council
- Interests include breaking 100 within my first three years as a golfer, skiing, and travel (Latin America, SE Asia)