

WORK EXPERIENCE:

EnerTech Capital Partners, Wayne, PA 4/05 – Present

Analyst – Energy and Communications Venture Capital

- Performed extensive due diligence on several new and follow-on investment opportunities
- Developed new portfolio management tools utilized to determine reserve levels, exit strategies, and valuation
- Actively developing relationships in Private Equity, Entrepreneurial, and Investment Banking communities
- Sourced second largest number of deals of any investment professional during current tenure
- Participating in raising fund, ECP III: attained meetings with key pension funds, fund of funds, and endowments; redesigned marketing materials
- Developed expertise in several industry sub-sectors, including advanced battery, power line communications, fuel cells, and central generation emissions
- Completed program at Venture Capital Institute
- Ran analyst hiring process; sourced and trained 1st year analyst

Deutsche Bank Securities, New York, NY 7/04 – 4/05

Analyst – Mergers, Acquisitions, and Corporate Advisory Group

- Extensive transaction modeling experience; actively involved in numerous sell-side and buy-side pitches
- Primary focus in Technology, Energy, and Industrials sectors
- Profiled companies and industries for strategic targeting
- Performed performance and market analysis

GMAC Commercial Mortgage, Horsham, PA 6/03 – 8/03

Market Risk Management/Capital Markets Intern

- Performed analysis on fixed income instruments for hedging risk on commercial loans held for securitization
- Ran Value at Risk analysis, various pricing models, and shadowed trade calls

La Casareccia (et al.), Caria/Bratiro, Calabria, Italy 1/03 – 5/03

- Worked as waiter in hotel-restaurant, learned to cook, built stage for town recital, went on archeological excavation

EDUCATION:

University of Pennsylvania, Philadelphia, PA

Wharton School, Summa Cum Laude, Bachelor of Science in Economics; Finance Concentration 5/04

College of Arts and Sciences, Summa Cum Laude, Bachelor of Arts in Classical Studies 5/04

Cumulative GPA: 3.84/4.00

Honors: Dean's List, 2000 – 2004; Wharton Dean's Award for Innovation Finalist; Golden Key Honor Society Member

COLLEGE ACTIVITIES:

First Call, Weekly Wharton Undergraduate Commentary Publication 9/03– 5/04

Founder, Editor-In-Chief, Columnist

- Founded publication to offer the Wharton community a weekly forum for written opinion
- Recruited team, obtained funding and other resources, and reviewed content and design
- Wrote weekly opinion/editorial column, "Wreakin' Havoc," discussing broad social, cultural, and political issues as well as commenting on the Penn community; column attracted wide readership and comment

University of Pennsylvania Chess Club 1/02 – 12/03

President/Vice-President of Finance

- Organized 1st Annual University of Pennsylvania Open Chess Tournament including over 30 participants
- Prepared newly reorganized club's first budget and obtained recognition by Student Activities Council

SKILLS:

- Proficient in wide range of financial tools
- Understanding of financial markets
- Strong skills in strategic and tactical assessment
- Extensive cross-discipline data analysis skills
- Team building and leadership experience
- Conversant in Italian
- Proficient in Latin; Novice in Ancient Greek
- Strong rhetorical, argumentation, and logic skills

INTERESTS:

Poker, chess, skiing, football, boxing, boating, fishing, movies, literature

Specific Transaction/Project Experience

EnerTech Capital

Investment in Anonymous Advanced Battery Technology Company (pending)

2007

*Developer of advanced lead acid battery technology for automotive, motive, and stationary power markets
Series A Investment (Early Stage)*

- Sourced deal
- Developed investment thesis: value proposition, return profile, and portfolio fit
- Conducted initial screening and due diligence
- Created several valuation models
- Performed comprehensive market and competitive analyses across several target sectors
- Analyzed company-built financial model for veracity, applicability, and functionality – identified critical market assumptions and model failures
- Coordinated outside technology evaluation by team of battery consultants

Investment in Cablematrix Technologies

2006

*Developer of software for real-time bandwidth management for cable broadband
Series A Investment (Early Stage)*

- Developed trading comparables analysis
- Created capitalization table
- Developed liquidation cascade analysis to examine return profile in various exit scenarios

Investment in Invidi Technologies Corporation

2005

*Developer of technology enabling targeted delivery of television content for cable and satellite providers
Series A Investment (Early Stage)*

- Created transaction and trading comparables valuation models
- Developed exit scenario analysis
- Developed liquidation cascade analysis
- Participated in due diligence calls

Investment in Catalytic Solutions, Inc

2005

*Developer of advanced materials for emissions reductions in automotive and central generation applications
Series D Investment (Later Stage)*

- Created multiple transaction and trading comparables valuation models to capture different potential growth paths
- Developed liquidation cascade analysis

Deutsche Bank Securities

Sale of Ion Track to General Electric

2004

Developer of explosives and narcotics detection technology for airports, military bases, and other government facilities

- Created combination models for alternative buyers
- Analyzed comparative impact of an IPO versus a merger with alternative buyers during dual-track process
- Performed industry and market research
- Assisted on due diligence calls

Project Linkage

2004 -2005

North America Corporate Finance Strategic Initiative

- Managed multi-disciplinary team, including outside consultants, to aggregate and analyze market and internal data
- Primary goal was to determine relationship between banking fees, equities trading, loan exposure, and research, from both market and firm-specific perspectives
- Developed unique models for understanding often subtle relationship between variables
- Presented findings to each of the 9 Industry group heads, the COO, and the head of Americas Investment Banking
- Prepared executive summaries on each industry group, explaining industry characteristics, Deutsche Bank's positioning and performance, and forecasting trends and opportunities
- Team eventually morphed into Deutsche Bank's North American strategy group; continues to utilize initial Project Linkage analytics and templates

Miscellaneous Non-Consummated Activity

Varied

- Analysis for large software company of acquisition opportunities among private Government/Military IT providers
- Buy-side advisory for large gaming company in acquisition of key competitor
- Buy-side advisory for European construction equipment manufacturer in acquisition of key US channel partner