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## **EXECUTIVEOVERVIEW**

30 + v	years of higher educa	tion, investment bar	ıkina .	private equ	itv . and	board leadership
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- x Associate Dean at SMUCox School of Business overseeing all facets of 5 graduate programs serving 1,300+ students, and executive educations trongly emphasizing cross-disciplinary and cross-campus collaboration. Drove cultural change and curriculum innovation with financial discipline, significantly enhancing brand and school reputation, student outcomes, and financial growth.
  - o Led the comprehensive strategic realignment of graduate programsand executive education that resulted in an increase inMBArankings to #26 from #481, improvement in student quality (712 GMAT and 3.6 GPAfor 2024 cohort)<sup>2</sup> and financial impact of \$115M+3, including a 2.7x increase in revenue for executive education!
- x Finance Professor of Practice at SMU Cox, Adjunct Professor at SMU Dedman Law, and Adjunct Faculty

- x Launched the MS in Real Estate, exceeding initial enrollment forecasts by 1.7x with a successful first cohort of 50 students.
- x Introduced SMU Cox Edge, a hybrid learning model offering flexible in person and virtual learning.
- x Developed 10 Graduate Certificates to create alternative pathways for lifelong learners Working with AT&T to launch the AT&T Mimi -MBA Certificate Program

#### TEACHINGEXCELLENCE ND MENTORSHIP

Impactful Teaching Record: Since 2018, taught0+ graduate courses and one undergraduate course at SMU Cox, influencing the academic journey of 1,500 tudents. My teaching evaluations consistently exceed both the departmental and overall SMU CoxSchoolaverages.

Additionally, teach several courses in SMU Cox Executive Education and served as the academic director for the Cox Leadership Academy. Courses includents formational Leadership, Al in Healthcare, Mergers & Acquisitions, Private Equity Corporate Governance and Ethical Decision Making.

#### Course Creation and Development:

- x Global M&A and Corporate Governan@BA, EMBA, OMBA)
- Ethical Leadership and Corporate Social Responsibility (MS)
- x Unbridled Venture ProjectMBA)

#### Course Revitalization:

- x International Strategy, Global Leadership Program(MBA)
- x Strategic Consulting & Global Leadership ProjetMBA)

### Cross-Campus Collaboration:

- x Business Law Boot Camino partnership with SMU Dedman Law Schoo(UD, LLM)
- x Ethics & Compliance Certifica**fe** collaboration with the Cary M. Maguire Center for Ethics and Public Responsibility and SMU Dedman Law School

## Non-SMUTeaching:

x Harvard Alumni for Climate and Environment, ClimaBoot Camp Sustainability training program

#### SMUCOX SERVICE

- x SMU Cox Graduate Policy Committee (2016/resent)
- x SMU Cox NextGe6urriculum Committee (2018 2020)
- x SMUCox Strategic Planning Committee (202/2022)
- x SMU Cox New Building Committee (2022024)
- x Numerous Search Committee(2018 present)
- x AACSB Accreditation Committee2(022)

#### **SMUC**AMPUSSERVICE

- x Co-Chair of International Student Recruitment and Support Subcommittee (20222024)
- x Co-Chair of SMU Community Action Network (20202021)
- x SMU Innovation Counci(2024 present)
- x Academic Program Review Committee (2022) resent)
- x Student-Athlete Academic Support Committee (2019present)
- x Internationalization Steering Committee (2022 2024)
- x Faculty Extra Compensation Committee (2024)
- x Master of Healthcare Administration Steering Committee (2024 present)
- x SMU+GSV Mission Summit (202**2**023)
- x SACSCOC Accreditation, SMU (Representative (2021)

#### **PROFESSIONAL**EXPERIENCE

#### THE CENTER FOR GLOBAL ENTERPRISE

New York, NY (2016-2020)

Managing Director, Head of Thapplied Corporate Governance Institute

The Center for Global Enterprise is a nonprofit, nonpartisan research institution devoted satudying global management best practices, the contemporary corporation, economic integration, and their impact on society

- x Led all aspects of the Institute, including research, data analyticand advisory services
- x Research Agenda: Investor Engagement, Hedge Fund Activism, International Corporate Stewardship, ESG and Sustainability, Lonterm Investing and M&A
- x Data and Analytics: Developed multiple predictive analytic models and proprietary algorithms, including the Stewardship Investor Vulnerability Indexto predict shareholder activism and investor engagement
- x Advisory: Advised companies to understand, engage, and succeed with their investors in complex and contested shareholder matters by developing insightful strategies and actical tactics

COLUMBIA LAW SCHOOL& COLUMBIA BUSINES SCHOOL RICHMAN CENTER FOR BUSINES LAW & PUBLIC POLICY Senior Fellow and Project Director

New York, NY (2016-2018)

Led shareholder engagement research project in partnership with The Center for Global Enterprise

- x Author of  $\delta$   $f \bullet f \% \ddagger \bullet \ddagger \bullet f \cdots \ddagger \bullet \bullet f \bullet \% \ddagger C \hat{o}$  lumbles the vertical publication  $\bullet$   $\delta$
- x Developed a framework for companies to respond to investor challenges that promote longerm investment decision-making to enhance sustainable, longerm value creation
- x Collaborated with Professor Wei Jiang, Vice Dean an Arthur F. Burns Professor of Free and Competitive Enterprise, and Professor Jeffrey Gordon Richard Paul Richman Professor of Law

WellsFargoSecurities

Dallas, TX (2010-2015)

Managing Director, Head of Investment BankingSouthwest U.S.

Led investment banking and capital markets franchise for select corporate clients in the Southwest U.S.

- x Founded the Southwest Investment Banking Group
- x Responsible for providing M&A, shareholder activism, corporate finance, and capital market advisory

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# CORPORATEBOARD DIRECTORSHIPS

Principal Diversified Select Real Asset Fund (MutualFund: PDSK.X) (2024–present) Board Trustee | Chair of

# NOT-FOR-PROFIT BOARD DIRECTORSHIPS

National Association of Corporate Directors (North Texas) (2022 -present)
Board Member | NACD Board Leadership Fellow | NACD Certified Director

Dallas Regional Chamber (2019 – present) Investment Committee