

NOMINATING COMMITTEE REPORT



ALPHA KAPPA PSI
The Professional Business Fraternity

March 22, 2021

A Zoom video meeting of the Nominating Committee was held on March 22, 2021, for the purpose of selecting a slate of candidates to recommend to the Chapter Congress for election to the Board of Directors of Alpha Kappa Psi.

In attendance on the call were:

| <u>Committee Member</u> | <u>Chapter Represented</u> |
|-------------------------|------------------------------------|
| Olivia Adams | New Jersey Institute of Technology |
| Lindsey Beaudry* | Oregon State University |
| Jake Chapman* | Loyola University-New Orleans |
| Naneen Christopher* | Seton Hall University |
| Basha Coleman* | Univ. of Tennessee Knoxville |
| James Derr* | Univ. of Richmond |
| Dani Epper | Drake University |
| Craig Fain* | Virginia Tech |
| April Finch | Purdue University |
| Senen Garcia* | Florida State University |
| Kasimu "Moe" Greenidge* | Univ. of Central Florida |
| John LeVering* | Boise State University |
| MC Moore* | Virginia Tech |
| James Neely* | Canisius College |
| Alicia Neumann* | St Louis University |
| Don Sechler* | Arizona State University |
| Scott Todd* | Central Washington University |
| Chrissy Vasquez* | Arizona State University |

*Alumnus

Also in attendance from the staff serving as the call coordinator, Brian Parker, Chief Operating Officer.

The meeting came to order at 8:01 PM EDT and after introductory remarks, instructions and roll call, the committee met with the candidates and interviewed them individually.

In total, the committee has dedicated several hours to vetting and evaluating the best candidates for the director positions. The committee considers each candidates professional and personal background as well as fraternity experience, including a demonstrated ability to understand the Board of Directors main role within AKPsi as the main strategic planning and policy-making body.

Having completed the rigorous evaluation process and having conducted a proper vote among the committee members, the Nominating Committee recommends to the Chapter Congress the following slate of candidates:

For the position of Director: **Jane Azzinaro**
Senior Consultant, Digital Strategy, Cognizant

For the position of Director: **Lane Velayo, CAE**
CEO/Owner, Synergos Association Management
Company

For the position of Director: **David Wendroff**
Owner, David P. Wendroff, CPA in Seaside, Oregon

All candidates' résumés are attached to this report.

The meeting was adjourned at 10:50 PM EDT.

Respectfully submitted by Chrissy Vasquez, Nominating Committee Chair

JANE AZZINARO, CFV

Omega Theta '10-Life | Bronze Distinguished Service Award | AKPsiJane@gmail.com

SUMMARY

As former Fraternity Vice President and Regional Director, Jane has experience implementing the Board of Directors' vision and communicating our Fraternity's long-term goals throughout the organization. Her Area team drove fraternity wide projects, through development of a standardized budget template for the Management Team and support of Task Forces -- brainstorming and developing solutions to questions we face as a Fraternity. Recognized by a Bronze DSA, Regional Manager of the Year, and chapter specific awards, she has continued to lead by example and encourage students, volunteers, and alumni alike to consider all paths and understand their personal roadmaps to achieve long-term goals.

Jane faces challenges head on with determination, willing and able to make strategic decisions to define and achieve Fraternity goals. As a Regional Director, she communicated a clear statement of growth expectations and goals and provided the support and resources for the team to support their chapters in achieving those goals. Over the course of the year, we delivered resources to volunteers and grew the Regional Management Team with first-time alumni volunteers. Though her team's leadership, students executed strong, smart recruitments driving 91% attainment of the Board of Directors' year-end chapter size goal for 2017-18. Additionally, interchapter events created an organic method for students to engage professionally and socially. Students and alumni became more connected and unified which provided a foundation to springboard into the following academic year.

FRATERNITY VOLUNTEER EXPERIENCE

Management Team

Vice President, Area III and Chapter Development & Operations

Sept. 2018-Oct. 2019

- Executive volunteer officer accountable for strategic direction and supervision of four Regions of 50+ Chapters
- Understood, translated, and provided guidance on implementation of Board of Directors' strategic vision
- Managed and mentored four Board of Directors-appointed Regional Directors across Mid-Atlantic region, driving their leadership development and goal achievement leading to recognition as the only Area to meet all goals for 2019-20
- Advised Fraternity Staff on chapter operational improvements and Fraternity-wide leadership pathway implementation
- Served on Integration Management Council to operationalize Board and Senior Management vision and goals for global Salesforce platform adoption by volunteers and students
- Advocated for project management approach, Fraternity Staff and Volunteer partnership, and Fraternity communications plan to successfully operationalize, support, and socialize initiatives

Regional Director, Central Atlantic Region

May 2016-Sept. 2018

- Oversaw 17 chapters with over 1,200+ student members, serving as their advocate when necessary
- Planned and managed Regional budget of approximately \$4,000 per year to drive Regional goals, incentives, and volunteer appreciation
- Ensured compliance with Fraternity policy and conduct guidelines in coordination with the Judiciary Committee and subsequent shifts in Probation and Show Cause expectations
- Appointed, led, and empowered a Regional Management Team of over 30 volunteers, training them to support our students while growing as individuals and professionals
- Coordinated and organized Regional Assemblies, specialized, and individual trainings to provide chapters with the proper training and resources required
- Engaged cross-functional teams of volunteers and Fraternity Staff to better support chapters, ensuring a wide net of support be available to students
- Managed conflicts at all levels of Region, serving as a mediator to refocus efforts in a constructive
- Member of Fraternity Management Team, providing input for strategic operations for the organization at-large
- Installed Chi Iota Chapter at Loyola University Maryland in 2016

Fraternity-Level

All-AKPsi Academic Team, Application Evaluator

2020, 2021

- Evaluated 50+ All-AKPsi Academic Team applications for Foundation to determine educational grant recipients

Pledge Education Task Force

2016-2017

- Collaboratively revamped fraternity Pledge Education Program (PEP) leading to development of the LEAD Pilot Program with 40+ chapter participants to inform next iteration of educational programming
- Co-created a comprehensive educational program to meet Fraternity expectations and needs while prioritizing risk reduction, consistency, and professionalism for all chapters and University officials can understand and recognize
- Resulted in creation and Fraternity-wide rollout of the Bridge To Brotherhood program in 2019, with praise for global focus with chapter-level flexibility
- Task Force members worked as change agents and educators on new process and expectations, leading shift in perception of rewards & recognition around current and future potential new member programming

Chapter Operations Task Force

2017

- Assessed new evaluation structure for student and alumni chapters to encourage positive behaviors and align rewards
- Collaborated to design tiered awards structure, allowing chapters to attain recognition in various areas of operations and provide a clear path for improvement toward operational excellence

Volunteer Certification Committee

2014-2015

- Determined baseline information all future Fraternity volunteers should be expected to know, providing long-term consistency in volunteer proficiency and understanding of important policies and procedures
- Provided input on the creation of the Qualified Fraternity Volunteer (QFV) Exam, now required of all volunteers
- Informed the redesign of the Certified Fraternity Volunteer (CFV) exam to demonstrate advanced Fraternal knowledge, driving volunteers' ability to provide quick and accurate information to students

Board of Directors' Nominations Committee

2012, 2014, 2015

- Selected by the Regional Director to represent the Region to present a slate of candidates for the Board of Directors

Central Atlantic Region

Chief Operating Officer

Regional Director: Robert Francis

Dec. 2019-Jul. 2020

- Organized and managed Regional initiatives leading to creation of monthly magazine tailored to meet student feedback
- Coached Regional Director on Regional volunteer succession planning, through assessment of staffing model
- Provided recommendations on strategic shifts to support volunteers' individual growth to achieve end-state vision
- Reinvigorated Regional social media accounts to drive additional virtual engagement during COVID-19, developing recommendations for increased communications

Regional Director: Sashwata Goswami

July 2014-Dec. 2015

- Served as principal deputy to the Regional Director, overseeing 17 chapters in Maryland, Virginia, and Washington D.C.
- Advised volunteers and chapters on fraternal policies, procedure and risk management issues
- Organized student Leadership Training, now known as Regional Assemblies, in tandem with Regional Director
- Assisted the Regional Manager of the Annual Chapter Report with the annual Regional audit of chapter submissions before submission to Fraternity Staff
- Achieved 100% compliance on volunteer training requirements for the Region

Chapter Advisor, Omega Theta Chapter - University of Maryland

Dec. 2015-May 2016

- Advised the chapter in matters of Fraternal policy & procedure, including budget, personnel, and best practices
- Monitored chapter progress towards completion of minimum standards of operations and administrative deadlines
- Supported risk mitigation through regular guidance with Executive Committee

Eastern & Mideast Regions - Prior to the 2014 strategic regional realignment

Regional Manager – Annual Chapter Report, Eastern Region

2012-2014

The Annual Chapter Report was replaced with the Chapter Success Plan (CSP) in accordance with realigned Fraternal goals. The ACR allotted point values to chapter achievements, with the goal of 100,000 points to become a Chapter of the Year.

- Advised and educated 20 chapters to help them understand and best utilize their Annual Chapter Report
- Used advanced metrics to track and analyze Regional and chapter-specific weaknesses to provide detailed improvement points to chapters and the Regional Management Team
- Average Regional ACR point total increase of over 11,000 points including two Chapters of the Year

Chapter Advisory Board – Annual Chapter Report, Pi Sigma Chapter - George Mason University

2012-2013

- Advised chapter Executive Vice President on maintenance of the ACR document and optimization of chapter events and operations, to achieve the highest point total possible

FRATERNITY EDUCATION & FACILITATION

Fraternity Advisor Conference

- Attendee: *Indianapolis (2013, 2016)*

Principled Business Leadership Institute

- Attendee: *Philadelphia (2011), Atlanta (2012), Boston (2020)*
- Facilitator: *Philadelphia (2013), Baltimore (2015), Philadelphia (2017), Boston (2018), Atlantic City (2019)*

Alpha Kappa Psi Convention

- Attendee: *New Orleans (2013)*
- Facilitator: *Norfolk (2015), Las Vegas (2017), Dallas (2019)*

Alpha Kappa Psi Academy, Mu Class

June 2012

- One of 18 students selected for all-expenses paid three-day leadership weekend

FRATERNITY HONORS & AWARDS

- Bronze Distinguished Service Award** Feb. 2013
- Fraternity Regional Manager of the Year, 2013–2014** Feb. 2015
- Increased Eastern Region chapters' average ACR scores by over 11,000 of a possible 100,000 points
 - Guided two chapters to achieve 100,000 points and become Chapters of the Year
- Regional Unity Award** Feb. 2017
- Central Atlantic Region at Convention 2017 for highest percentage of chapters with 2+ student members registered

STUDENT MEMBER EXPERIENCE

Omega Theta Chapter- University of Maryland

- Director of Pledge Education** 2011-2012
- Educated two semesters of pledge classes, a total of 41 pledges, to learn Fraternity history, policy, and leadership
 - Developed & instituted restructured quizzes to best prepare pledges for the Chapter's Midcourt & Court of Honor goals
 - Implemented organized, objective way to track pledge performance while prioritizing transparency with the chapter
 - Enforced Risk Management policy
 - Coordinated with the Vice President of Pledging and the Director of Pledge Unity to form the Pledge Team
- Outstanding Brother Award, Omega Theta** 2011, 2012
- For chapter-level excellence throughout the academic year
- Treasurer, Theta Pledge Class** 2010
- Led Fundraising Committee to raise over \$1,000 during eight weeks of pledging

Regional-Level

Installation Team

- Psi Delta Chapter - *Shenandoah University* 2012
 - Pi Sigma Chapter - *George Mason University* 2011
- Brooklyn Bridge Award** May 2011
- For exceptional service to the Pi Sigma Chapter at George Mason University during its colony period

JANE AZZINARO

Silver Spring, MD | JaneAzzinaro@gmail.com | LinkedIn.com/in/JaneAzzinaro

EXPERIENCE

COGNIZANT

Washington, DC | New York City, NY

Senior Consultant, Digital Strategy

June 2019- Present

Driving program & change management to enable organizational and digital transformations at an enterprise level

Engagement. Healthcare client, digital transformation change management rescue

- **Teamwork.** Managed operational readiness team of 10 on large-scale digital transformation to four successful Salesforce go-lives for 4,000 front and back-office users, while establishing best-practice model for virtual end-user support during COVID
- **Leadership.** Backfilled Director to lead all change activities for major program due to deep relationships with senior client leadership; recommended to stand up additional workstreams based on performance
- **Innovation.** Designed enterprise-level mapping and tracking tool for 1,400+ end users' data literacy needs for rollout of eight new applications including Tableau providing cross-sectional data analysis, leading to program funding in excess of \$500k
- **Governance.** Crafted robust Executive-level readouts program-level status, project plan milestones, and risks & impacts across four projects

Engagement. Human Resources, Total Rewards and HR Mergers & Acquisitions strategic projects

- **Project Management.** Mobilized and currently managing three-year roadmap for global transformation initiatives impacting 250k+ associates in ~50 countries
- **Communication.** Regularly develop Board of Directors reports and deliverables including confidential funding proposals >\$30M and gaps assessments to inform strategic investment decisions

Practice.

- **Business Development.** Co-created go-to-market offering and playbook for end-to-end transformations resulting in sales of \$1.2M+, including continuation for 5 consultants on existing platinum-level client
- **Mentor.** Formally and informally coach consultants across practices on performance, promotions, and on-boarding

J. AZZINARO CONSULTING, LLC

Silver Spring, MD

Principal Consultant

October 2016 – December 2020

Worked with small and medium sized businesses to reinvigorate their approach to digital marketing

- **Strategic Review.** Assessed six existing multi-channel marketing tactics to increase three-year business growth resulting in recommendation to increase operational efficiency before new investment to increase ROI
- **Process Improvement.** Reviewed seven business systems to streamline marketing and financial processes and decrease risk
- **Org Design.** Proposed organizational redesign of 10 employees based on stakeholder interviews and corporate limitations

STRATEGIC ENGAGEMENTS

MBA Consultant

2017 – 2019

Provided strategic and data-driven recommendations through teamwork and client partnerships

- Market entry & growth strategy for Founding Farmers Restaurant Group Washington, DC
- Benchmarking strategy for Arts and Industrial District creation Arlington County, VA
- Operations & technology strategy for TBC Insurance, *Project Lead* Tbilisi, Georgia
- Foreign direct investment assessment for Siemens, *Information Technology Lead* HCMC, Vietnam

DELOITTE CONSULTING LLP

Rosslyn, VA

Summer Associate, Senior Consultant, Strategy & Operations

June 2018 – July 2018

- **Research.** Researched and organized comprehensive data on existing client programs for proposal
- **Analysis.** Studied feasibility of standardized domestic absentee vote-by-mail envelopes across all states and localities
- **Evaluation.** Performed customer breakdown for market scan to evaluate new identity services solution for a Federal Agency

GLOBAL CONSULTANTS, LLC

Hanover, MD

Digital Marketing Manager

January 2013 - October 2016

- **Results.** Direct financial impact: Increased installed business from internet leads by over \$8M
- **Goal Oriented.** Spearheaded two successful campaigns for positive online reviews and higher email capture rates
- **Digital.** Organized and optimized pay-per-click campaigns with budgets in excess of \$25K per month; Established, maintained and cultivated social media presence; Implemented reputation management procedures to improve corporate image

ACHIEVEMENTS

- Volunteer** Alpha Kappa Psi: Former Vice President of Chapter Development & Operations and Area III, Central Atlantic Regional Director, Regional Chief Operating Officer & more. Received National Awards.
- Publications** Co-author: “Are ‘big law’ firms ready for a makeover” (The Hill, 2019);
Co-author: “Where Law Firm Partners Go When Changing Jobs” (Law360, 2019)
- Development** SAFe Agile Certified 2019;
Deloitte Women’s Leadership Launch 2018, 1 of 79 women of 600 applicants from 36 MBA programs;
Forté Foundation MBA Women’s Leadership Conference 2017
- Recognition** Global Master of Business Administration Outstanding Contributor Award 2019, selected by peers;
U.S. Chamber of Commerce Foundation Case Competition 2017, 2nd Place of 105 submissions from 42 programs;
Edie Hunt Inspiration Award Nomination 2019, 1 of 63 nominations from 20 MBA programs

EDUCATION

THE GEORGE WASHINGTON UNIVERSITY, School of Business

Washington, DC

Master of Business Administration

May 2019

- Executive Vice President, MBA Association
- Mentoring & Immersion Program for Consulting: Highly competitive program with mentors from firms including McKinsey
- Forté Fellowship Scholarship
- Strategic Management Graduate Assistant for 60+ MBA students
- Management Consulting Project, coached 20 MBA students to present recommendations to three clients

Washington, DC

Berlin, Germany

UNIVERSITY OF MARYLAND, Robert H. Smith School of Business

College Park, MD

Bachelor of Science, Marketing; Minor, Leadership Studies

December 2012

- Capital One Internship Leadership Program: Selective year-long course with an impactful internship, culminating in building sustainable projects in Uganda with a women’s micro-finance group
- Alpha Kappa Psi, Professional Business Fraternity, Omega Theta Chapter ’10-Life



Lane Velayo

Eta Chapter '00, *Life*

Recognitions

Bronze Distinguished Service Award, 1st degree

Related Involvement

Donor, *Alpha Kappa Psi Foundation*

- More than 15 years of consecutive giving to the Alpha Kappa Psi Foundation

Emcee, Alpha Kappa Psi Convention Grand Banquet

- Developed scripts and run of show for convention grand banquet
- Created and edited video files
- Led presentation during the grand banquet

Presenter, *Success Institute*

- Developed and executed presentations on fraternal topics at Success Institute
- Led roundtable discussions

Chapter Advisor *Lambda Upsilon Chapter, Butler University*

- Ensured compliance on fraternity standards
- Trained officers, facilitated planning discussion
- Assisted the chapter in networking to help them achieve their goals

Regional Trainer, *Midwest Region*

- Developed agenda for Midwest region training
- Handled on-site logistics
- Presented on fraternity related topics

Director of Alumni Development, *Alpha Kappa Psi staff*

- First ever Director of Alumni Development
- Led outreach to alumni chapters
- Identified potential prominent alumni
- Developed alumni outreach strategy plan with Board of Directors
- Assisted with Heritage Center fundraising campaign

Lane Velayo, CAE »
5210 Central Ave. » Indianapolis, IN 46220
Lane.Velayo@gmail.com » 317/201-3550

CAREER OBJECTIVE

To obtain an interesting and challenging position that will allow me to leverage my years of association management and not for profit work, while utilizing and continuing to develop my excellent creative, organizational and communication skills.

AWARDS, RECOGNITION & LEADERSHIP

| | |
|-------------------------------------------------------|---------------------------------------------------|
| 'Top 40 Under 40' of Association Professionals | <i>Association Forum</i> |
| Diversity Executive Leadership Program | <i>American Society of Association Executives</i> |
| Executive of the Year | <i>Indiana Society of Association Executives</i> |
| President, Board of Directors | <i>Indiana Society of Association Executives</i> |
| Chairman, Council of State Executives | <i>National Association for Music Education</i> |

EDUCATION

| | | |
|---------------|-------------------------------------------------------------------------------------------------------------------|-------------------------|
| June 2003 | University of Cincinnati, College of Business | Cincinnati, Ohio |
| | <ul style="list-style-type: none">• Bachelor of Business Administration in Marketing and Accounting | |
| December 2008 | American Society of Association Executives | |
| | <ul style="list-style-type: none">• Certified Association Executive | |

CEO/Owner, Synergos Association Management Company August 2017 - Present

- 100% minority owned company
- 10%+ growth each year since 2017
- \$1M+ Revenue
- Accredited by the AMC Institute
- State, National and International clients
- Award winning work has been recognized by Meeting Professionals International, Indiana Society of Association Executives and other state and national organizations.

RELATED PROFESSIONAL EXPERIENCE

Executive Director, Indiana Music Education Association

- Manage day to day operations of both Associations
- Organization was recognized by the National Association for Music Education for largest membership campaign in 2014
- Recognized by the Indiana Society of Association Executives Star Awards program multiple years
- Led brand re-launch in 2013
- Launched a 501c3 Foundation affiliate to help underwrite Music Education initiatives in Indiana

Executive Director, Indiana and Greater Indianapolis Hotel & Lodging Associations (IHLA & GIHLA)

- Represent the Hotel & Lodging Industry at events and activities throughout Indiana and nationally
- Lead grassroots governmental affairs work

Director of Alumni Development, Alpha Kappa Psi Fraternity, Inc.

- First full-time director hired by the Fraternity with the sole mission of developing alumni affinity
- Developed, and Implemented Alumni Program Strategic Plan affecting 150,000+ alumni internationally
- Worked with Board of Directors in determining direction for Fraternity Strategic Plan
- Developed and Implemented Building Fundraising Campaign
- Coordinated work with a core of volunteers and over 185 student chapters
- Edited and Developed communications to alumni base
- Interacted with vendors on Alpha Kappa Psi's affinity programs – branded credit card, discounts, etc.

David P. Wendroff, CFV, Life

Alpha Kappa Psi
Fraternal Resume

Gamma Kappa Chapter at the University of Portland

- 1979 – Initiated
- 1980-81 – Finance Committee Chair
- 1982 – Graduated and became a Life member

Portland Alumni Chapter

- 1982-83 - Treasurer
- 1983-84 - Vice-President
- 1984-86 - President

Northwest Regional Director (now named Pacific Northwest Region)

- 1987-92 - Northwest Regional Director

Alpha Kappa Psi Fraternity Board of Directors

- 1995-99 - Treasurer
- 1995-01 - Member of the Executive Committee
- 1999-01 - Chairman of the Fraternity Board of Directors
- 2001-02 - Immediate Past Chairman

Alpha Kappa Psi Foundation Board of Directors

- 2004-07 – Member
- 2007-09 – Vice-Chair
- 2009-13 – Chairman of the Foundation Board of Directors

Other volunteer roles

- 2007-08 - Co-Chapter Advisor Theta Chapter at Oregon State University
- 2008-09 - Chapter Advisory Board Theta Chapter
- 2002-06 - Dean, Alpha Kappa Psi University Finance Section
- 2009 - Current – Convention Volunteer Coordinator
- 2014-20 – Member Fraternity Ritual Team Member
- 2016-21 - Chair Building Initiative Steering Committee
- 2015 - Current – Regional Manager-Finance for Pacific Northwest Region
- 2016-21 - Facilitator Fraternity Advisor Conference and Presidents Academy

Other accomplishments

- Attended over 10 Chapter Installations
- Attended 18 Conventions
- Attended over 40 Success Institutes & PBLIs
- Attended Centennial Chapter Celebrations for Delta, Kappa, Theta & Rho
- Attended Dedication for Two AKPsi Headquarter Offices
- Sponsored CEO Office at Heritage Center
- Donated to Alpha Kappa Psi Foundation for over 28 years
- Member of Alpha Kappa Psi Foundation Clifford Spangler Society

- Lifetime Giving Level for Alpha Kappa Psi Foundation is Leadership Circle
- Sponsored an Academy Fellow for 15 years

Awards

- 1992 – First Degree Silver Degree Distinguished Service Award from Gamma Kappa Chapter at University of Portland
- 2007 – Second Degree Silver Distinguished Service Award from Theta Chapter at Oregon State University
- 2013 - Gold Distinguished Service Award

David P. Wendroff, CPA

PO Box 877

Seaside, OR 97138

Phone 503-784-8678

Fax 503-213-5841

dave@wendroff.com

Professional Experience

Owner of David P. Wendroff, CPA in Seaside, Oregon from 1987 to present

Providing CFO services to small and mid size privately held companies, and tax preparation services to individuals and corporations.

Services include:

- ◆ Financial analysis
- ◆ Monthly financial statements
- ◆ Account reconciliations
- ◆ Tax preparation
- ◆ Audit and review preparation
- ◆ Work paper preparation
- ◆ Management consulting
- ◆ Project support including securing bank loans, legal and insurance support.
- ◆ Member of clients Board of Directors, responsible for providing strategic planning services along with Treasurer and Secretary duties.

Chief Financial Officer for Wadeco, Inc. in Tualatin, Oregon from 1987 to present

A manufacturer and distributor of large-scale agricultural irrigation and mining systems.

- ◆ Supervision of accounting department supervising 4-5 clerks & accounting managers.
- ◆ Day to day financial operations
- ◆ Monthly closings for three divisions and 6 companies
- ◆ Account reconciliation
- ◆ Preparation of financial statements for board of directors and banks
- ◆ Negotiating bank lines of credit more than \$1 million
- ◆ Negotiating insurance contracts for general and product liability and other types of insurance
- ◆ Managing employee benefit plans
- ◆ Negotiating contracts for 401K plan, medical, dental, life and disability insurances
- ◆ Managing commercial rental operations for two multi-tenant manufacturing properties including negotiating leases
- ◆ Computer support for multi-user operating systems
- ◆ Managed multiple mainframe computer conversions
- ◆ Windows and other software support for company employees
- ◆ Sales department financial analysis and support
- ◆ Product line analysis
- ◆ Foreign sales project support including securing project financing or credit insurance from Export-Import Bank
- ◆ Managing credit department
- ◆ Meeting with foreign customers and creating turn-key financing options

- ◆ Strategic planning, financial projections, and budgeting
- ◆ Mergers and acquisitions.

Chief Financial Officer for R. M. Wade & Co. in Beaverton, Oregon from 1987 to present

A wholesale distributor of farm and garden products.

- ◆ Supervision of accounting department supervising up to 4-5 accounting clerks and accounting manager
- ◆ Day to day financial operations
- ◆ Monthly closings for four companies and multiple divisions
- ◆ Account reconciliation
- ◆ Preparation of financial statements for board of directors and banks
- ◆ Negotiating bank lines of credit and insurance contracts
- ◆ Managing commercial rental operations
- ◆ Managing employee benefit plans
- ◆ Negotiating contracts for 401K plan, medical, dental, life and disability insurances
- ◆ Computer support
- ◆ Sales department financial analysis
- ◆ Support and mergers and acquisitions

Senior Auditor for KPMG Peat Marwick Main and Co. in Portland, OR from 1983 to 1987

A big four accounting firm.

- ◆ Supervision of staff, accountants, audits, and reviews of mid-size private companies
- ◆ Tax preparation for mid-size private companies

Staff Accountant for Dietrich, Bye, Griffin and Youel in Portland from 1982 to 1983

Honors, Awards and Associations

- ◆ **Certified Public Accountant**, licensed in State of Oregon since 1984
- ◆ **Past President**, Portland Chapter, Institute of Management Accountants
- ◆ **Past National Director**, Institute of Management Accountants
- ◆ **Past Chairman of the Board of Directors and Executive Committee**, Alpha Kappa Psi Professional Business Fraternity
- ◆ **Past Chairman**, Alpha Kappa Psi Foundation
- ◆ **Gold Distinguished Service Award Recipient**, Alpha Kappa Psi Professional Business Fraternity
- ◆ **Member**, American Institute of Certified Public Accountants
- ◆ **Member**, Oregon Society of Certified Public Accountants
- ◆ **Member**, National Society of Tax Professionals
- ◆ **Member**, National Association of Tax Professionals

Education and Training

- ◆ **University of Portland**, Bachelor's Degree Business Administration in Accounting, 1982

Hernan Mayol - Fraternal Resume

Fraternal Resume

- 1991 Pledged AKPSI Beta Pi
- 1991 Master of Rituals
- 1992 Vice President of Membership / Advisory Team Florida Expansion (lead to establishment of Xi Sigma).
- Delegate Regional Conference - Atlanta
- 1993 President of Beta Pi (two terms) / Delegate National Convention - Nashville
- 1994 Vice President of Alumni Relations / Lead Efforts to start Alumni Chapter (now FGCAC)
- 1996 President FGCAC
- 2013 Nominee for Regional Director (lost to JG) / Speaker and Volunteer Beta Pi
- 2014-2018 Chapter Advisor Xi Sigma / CFV
- 2016 Speaker - Presidents Academy
- 2016 Nominee for Executive Vice President (lost to MD)
- 2017 Judge - Case Competition - PBLI
- 2018-2021 Section Director South Florida

Hernan Mayol

Miami, Florida, United States



hernanmayol@gmail.com



[linkedin.com/in/hernanmayol](https://www.linkedin.com/in/hernanmayol)

Summary

A Global Leader with over 25 years experience in Banking, Sales Strategy, and Business Development focused on Working Capital Solutions, Structured Trade Finance, Risk Mitigation, Alternative Investments and Innovation in the Financial Services industry.

Mr. Mayol has held Senior positions in Bank of America, Wells Fargo, TD Bank and Regions Bank. In his current role at EIA Global, he is responsible for Credit Risk Mitigation Sales and Investor Relations. He is also the Founder and CEO of Apprentice Worldwide, a Global Career Development Network to support NextGen Leaders.

Mayol is a Community Leader and Guest Speaker, serving in numerous capacities with leading industry organizations such as Highradius, Planet of finance, Florida International Bankers Association - FIBA and the International Trade and Forfeiting Association - ITFA. Mayol has an MBA and BBA in International Finance and Marketing from the University of Miami and is an Adjunct Professor at Florida International University.

He has also been Impacting Young Adults for more than 20 years as a Catholic Lay Minister, an Advisor for Colleges Students in the US and a Mentor / Coach to Next Generation Leaders around the world. He currently serves as a Section Director for Alpha Kappa Psi in South Florida and as the CEO of Apprentice Worldwide.

Experience



Managing Director

EIA Global

Dec 2018 - Present (2 years 1 month +)

Representative - Miami Office. Currently responsible for Relationships with Investors and Fintech Providers / Lenders. Our proven expertise has allowed us to develop, earn and sustain the credibility and respect of our clients, which include some of the largest corporates and financial institutions in the US, and our insurance partners.



Business Payments Consultant

Heartland

Jan 2018 - Nov 2018 (11 months)

Provide advisory services for Credit Card processing / Merchant Services clients. Market additional HPS products and services (payroll, lending and systems) introduced under company guidelines.



Managing Partner and Consultant

Worldwide Financial Solutions

Jul 2017 - Nov 2018 (1 year 5 months)

Founded a boutique consultancy firm focused on delivering creative financial solutions to banks, international companies and small businesses.

These include:

- Product Delivery: Helping uncover adequate sources of financing, technology and risk mitigation.
- Consulting: Working capital management, process improvements and credit management.
- Training: Educating personnel on best practices in the global front and providing a systematic approach to implementing these solutions.

Recent projects: Acting CCO for Blockchain FinTech, SWIFT process audit for NY Bank, Credit and Operating audits for Miami Banks, Merchant Services for Small Businesses, Introductions for new technology entrants in Banking, Conducted several trainings for Banking Associations in the Region.

Sales Director - Global Banking Consultant

Wells Fargo

Jan 2015 - Mar 2017 (2 years 3 months)

Responsibilities: Business Development. Advise, train and work with internal partners to consultatively sell customers customized solutions involving international credit, foreign exchange, international treasury and trade; Serve customer/ prospects with international credit products solutions such as trade cycle finance, cross border lending, structured trade finance, EXIM working capital and other international financing options.

First point of contact for payment products such as international treasury management, and foreign exchange; Be the conduit through which Wells Fargo delivers products and services available through our Global branch network to our US customers; Establish cross-border and cross-functional deal teams to develop and implement global solutions.

Regional Sales Manager, Supply Chain Solutions and Risk Distribution - Latin America & the Caribbean

Bank of America Merrill Lynch

Jul 2014 - Dec 2014 (6 months)

Coordination of cross-regional transactions and lead generation through channel/network financing activities with local Corporate and Commercial clients, Financial Institutions, Multinational and Public Sector Companies. Continue to support portfolio optimization/distribution strategies, product enhancement and implementations.

Director and Head of Trade Risk Distribution/Portfolio Optimization

Bank of America Merrill Lynch

Apr 2012 - Aug 2014 (2 years 5 months)

Manage Asset Sales and Distribution activities for Latin America Corporate and Financial Institutions. Responsible for proactively managing the Global Trade Portfolio with the goal of meeting clients needs while maximizing returns through the efficient use of capital. Support overall Trade strategy for the Region through active collaboration with teams in the US, EMEA and Asia.

Director- Corporate Banking Latin America Region

Bank of America Merrill Lynch

Oct 2009 - Apr 2012 (2 years 7 months)

Responsible for managing GTS relationships for Latin America Region outside of Mexico and Brazil. Provide Working Capital Solutions and Technology for Large Corporates in the Region to handle

Trade and Supply Chain Solutions, Credit Card, FX, Custody, Liquidity, Global Payments and Cash Management Options.



Regional Head - Latin America and SE Middle Market - Global Trade & Supply Chain Solutions

Bank of America Merrill Lynch

Aug 2007 - Nov 2009 (2 years 4 months)

Responsible for Implementing and Executing the Trade Strategy for Latin America and the Southeast US markets by Structuring Trade and Supply Chain transactions for FI, Large Corporates, Banks, Middle Market and Business Banking.



Vice President- Regional Manager- International Division

TD

2006 - Aug 2007 (1 year 8 months)

Corporate and Commercial Lender focused on Multinationals. Added responsibilities include being Senior Underwriter for US Eximbank Working Capital Guarantee and Foreign Buyer financing transactions. Also, promoted Trade products to Bank clients in Florida.



Vice President- Regional Manager- Commercial Division

BLADEX

2005 - 2006 (2 years)

Senior Relationship Manager for Corporates, Government and Banks in Caribbean, Central America and Andean countries. Primarily focused for Lending activities. Structured Product Manager. Implemented Inter-American Development Bank's Trade Facilitation Program.



Regional Vice President- Structured Trade Finance

Wachovia Corp

2000 - 2005 (6 years)

- Structured larger trade transactions for Financial Institutions and Corporates in the Latin America Region
- Assisted in Portfolio risk mitigation (Factoring, Forfaiting, Government and Private Insurance Programs)
- Acted as advisor to Foreign Financial Institutions on improving Trade processes to Higher Standards.
- Lending Officer for Florida Commercial Bank clients with Trade transaction.



Vice President- Regional Manager - Financial Institutions LATAM

Regions Bank

1997 - 2000 (4 years)

Managed Correspondent Banking relationships with for Banks in South America and Mexico. Cash Management and Trade Product Sales.



Relationship Officer - Trade Lending

Hamilton Bank

1994 - 1997 (4 years)

International Credit Training Program with emphasis on International Corporates and Correspondent Banking. Lending Officer- Managed portfolio of Trade Finance clients.

Education



University of Miami Herbert Business School

Master of Business Administration, International Business
2000 - 2001



University of Miami Herbert Business School

Bachelor of Business Administration, International Finance and Marketing
1990 - 1994



Florida International University - College of Business

Adjunct Professor, Executive and Professional Education - Banking and Financial Services

Currently representing the University in the business community--foreign and domestic, both-- working in the area of program development for clients in financial services, business associations and non-profit institutions. Secure opportunities with seminars, workshops, and FIU non-degree certificate and diploma programs.

Licenses & Certifications



Career Coaching (Career Change) - Certificate - Udemy

UC-1CJ8AQRR



Certified Entrepreneurship & Business Coach - Transformation Academy

<https://udemy-certificate.s3.amazonaws.com/image/UC-8YUEJ8PW.jpg>



Exercising Leadership: Foundational Principles - Harvard University

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Skills

Trade Finance • Banking • Commercial Banking • Credit • Risk Management • Portfolio Management
• Finance • Financial Services • Financial Risk • Loans

Honors & Awards



Top Performer - Global Transaction Services

Feb 2012



Top Referral Partner - Global Treasury Services

Feb 2009

DARIN SCHULD

DELTA SIGMA, 1994 LIFE
RECIPIENT, SILVER DISTINGUISHED SERVICE AWARD-SECOND DEGREE

AKPsiDarin@DarinSchuld.com
314-594-7257



*Dedicated brother with more than twenty years of service to Alpha Kappa Psi.
A strategic and action-oriented leader focused on maintaining and strengthening
the high standard of brotherhood and the development of principled business leaders.*

FRATERNITY EXPERIENCE

- Chapter Advisor, Psi Chapter** 2018 – present
- Guide, advise, and mentor a high-performing chapter on fraternity procedures and programming, chapter activities and professional development, and interpersonal relationships
 - Aid chapter leaders with strategic planning on the future direction of the chapter
- Member, Fraternity Rituals Team** 2015 – present
- Regional Director, Eastern Great Plains Region** (formerly Central Region until July 2014) 2011 – 2018
- Recognized as the AKPsi ‘Number One Region’ for 2014-2015.
 - Provided strategic direction for the region, the regional management team, and chapters.
 - Coordinated the operations of 16 chapters, totaling more than 1,300 active student members.
 - Managed the regional budget, plus appointed and led a qualified, volunteer, regional management team.
 - Educated chapters and ensured adherence to all policies and risk management guidelines.
 - Mentored and coached chapter officers and encouraged activities to meet and exceed regional and fraternity goals.
 - Served as a member of the fraternity's management team, with other regional directors, providing input on fraternity operations and direction.
 - Installed the Chi Nu Chapter at the University of Missouri-Kansas City
- President, St. Louis Metro Alumni Chapter** 2004 – 2011
- Functioned as the chief executive of chapter.
 - Spearheaded the chapter's strategic planning efforts and led activities to achieve strategic goals.
 - Organized and chaired organizational meetings and major chapter events.
 - Initiated efforts to develop a scholarship fund to aid selected student members with their educational costs.
 - Encouraged and undertook activities leading to the enrichment and education of members, along with contributing to the community.
 - Chapter was recognized with five fraternity awards for outstanding brotherhood and unity events.
- Member, Alumni Chapters Advancement Commission** 2006 – 2011
- Regional Manager of Technology, Central Region** 2002 – 2005
- Chapter Advisor, Delta Sigma Chapter** 1996 – 2002

FRATERNITY EVENT ATTENDANCE

- **Convention:** 2001, 2003, 2005, 2007, 2009, 2011, 2013, 2015, 2017, 2019, 2021 (anticipated)
- **PBLI:** 2012, 2013, 2014, 2015, 2016, 2017, 2018
- **Fraternity Advisors Conference:** 2015
- **Chi Nu Chapter Installation:** 2014
- **Alpha Lambda Chapter Reactivation:** 2003

PROFESSIONAL QUALIFICATIONS

- Versatile and efficient project manager, able to meet commitments on multiple concurrent projects.
- Highly analytical and methodical thinker that can articulate effective approaches to meet strategic goals
- Skilled in all facets of project management, from planning to completion, including monitoring and controlling scope, cost, quality, conflict, and risk.
- Effective communicator across the broad spectrum, from senior leadership to lower-level associates.
- Conduct configuration management activities, to contribute to consistency and efficiency across the enterprise.
- Analyze and re-engineer business processes and procedures to make them more efficient and in alignment with strategic organizational and technological needs.

PROFESSIONAL EXPERIENCE

BI-STATE DEVELOPMENT AGENCY – Saint Louis, Missouri 2012 – present
An interstate compact created by the United States Congress to enrich the St. Louis region, it operates the Metro Transit system, the Gateway Arch Riverfront attractions, the St. Louis Downtown Airport, and the St. Louis Regional Freightway.

Senior Business Analyst/Project Leader

- Lead projects to support corporate functions, reduce manual processes, and improve efficiency.
- Collaborate with stakeholders to strategize and determine long term direction.
- Liaison between users, leaders, and developers to gather and document business and functional requirements.
- Identify and recommend customizations and enhancements, to better align with re-engineered processes and strategic initiatives.
- Provide tailored training for the technology solutions and associated processes.
- Ensure that objectives are accomplished in accordance with outlined priorities.
- Work closely with project stakeholders to ensure all milestones were met.
- Create, maintain, and organize effective project documentation, to comply with process standards.
- Track project financials and status, ensuring that targets are met.
- Manage the ongoing software support and maintenance with third-party vendors.

ASYNCHRONY SOLUTIONS – Saint Louis, Missouri 2011 – 2012
An information technology consulting firm specializing in systems integration, enterprise architecture, custom application development and secure collaboration.

Senior Business Analyst/Systems Engineer

- Collaborated with upper-level decision-makers in developing an enterprise architecture, which provides a strategic framework for standardizing business, technology, and data management within a secure network infrastructure.
- Led the transformation and improvement of configuration management governance activities
- Evaluated and recommended software and technologies to align with the enterprise architecture development.
- Conducted work process and task observations, interviews, and analysis.
- Analyzed and re-engineered workflow processes to enable activities to more efficiently function.
- Coordinated, and collaborated with, functional developers, reviewers, and decision-makers to effectively conduct the configuration management processes for the organization.

ANCHOR IT – Saint Louis, Missouri 2009 - 2011
An organization that specializes in creating cost-effective solutions for small businesses and non-profit organizations.

Senior Analyst/Project Coordinator

- Liaison with business users to determine and create high level business requirements and project scope, to align with organizational, data reporting, and process efficiency goals.
- Led projects to analyze, develop, implement, and administer web solutions utilizing principles of the user-centered design and usability concepts.
- Developed ad-hoc and recurring queries and reports, in support of organizational and decision-making needs.
- Created and/or re-engineered workflow processes that enabled technology and business functions to efficiently function together for stakeholders in the organization.

UNIGROUP, INC – Saint Louis, Missouri

2005 - 2009

The parent company of United Van Lines, Mayflower Transit, and other subsidiaries which focus on delivering transportation, relocation, and logistics solutions to residential and commercial clients around the globe.

Senior IT Business Analyst and Project Leader

- Liaison between transportation and/or business users and IT to gather and document business and functional requirements.
- Conducted work process and task observations, interviews, and analysis.
- Effectively led projects, to analyze, select, acquire, develop, test, implement, and maintain software packages to support corporate functions.
- Coordinated the process to identify, analyze, and select third party software.
- Identified and recommended customizations and enhancements, to better align with, and support, re-engineered processes.
- Provided tailored training for the technology solutions and associated processes.
- Ensured that objectives were accomplished in accordance with outlined priorities.
- Worked closely with project stakeholders to ensure all milestones were met.
- Developed solutions to interface with corporate software applications.

ELECTRONIC DATA SYSTEMS – Maryland Heights, Missouri

1996 - 2004

A global outsourcing services company that provides a broad portfolio of information technology, applications, and business process solutions to help its clients improve their business performance.

Information Systems Analyst

- Gathered, documented, and analyzed current business processes, to aid in developing the project objectives and project scope.
- Analyzed technical issues and created detailed technical designs.
- Developed effective solutions based on approved designs.
- Effectively handled troubleshooting for software issues.
- Drafted, revised and finalized test plans and scripts to ensure alignment logic and verify system flow.
- Conducted quality assurance testing and follow-up analysis to ensure that the software and/or hardware met or exceeded specified standards and end-user requirements.
- Developed efficient helpdesk procedures and user documentation to ensure quality customer satisfaction.
- Valuable member of the team that achieved *Level 3* of the Software Engineering Institute's Capability Maturity Model on software engineering process quality.

EDUCATION AND TRAINING

SAINT LOUIS UNIVERSITY - St. Louis, Missouri

Bachelor of Science in Business Administration,
Concentration/Major in Management Information Systems
Graduated Cum Laude and Dean's List

CENTER FOR WORKFORCE & ORGANIZATIONAL DEVELOPMENT, SAINT LOUIS UNIVERSITY - St. Louis, Missouri

Certificate in Business Analysis
Certificate in Project Management

OTHER ACTIVITIES

- Cultural Festivals/Saint Louis Art Fair: Past Guest Relations Chair overseeing 85+ volunteers
- St. Patrick's Day Parade Committee of St. Louis: Past Parade Support Mgr of 103+ volunteers; Web Administrator
- Webster Community Arts Foundation: Past Web and Email Administrator