
PROFESSIONAL BIO

An engaged leader across multiple industries with proven application of executive management skills, corporate finance, strategic planning and large project management. Over 20 years of leadership in the full lifecycle of contract negotiations, healthcare finance, real estate finance, technology implementations, commercial banking and organizational change management. Significant ability to multitask and deliver results within a team environment or independently, as necessary. Strong experience in healthcare from care pathways to billing/reimbursements to policy and compliance. Political acumen and cultural sensitivity.

PROFESSIONAL EXPERIENCE

Alert Alarm Hawaii (<http://www.alertalarmhawaii.com>)

CFO / Secretary, Feb. 2015 to Present

Managed largest integrated security firm in Hawaii with offices located on each major island and in Utah. Over 140 employees and 35 contractors delivering over 10% annual growth. Reduced operating expenses through strategic outsourcing of A/P and HR. Rebuilt banking and community relationships, and implemented performance evaluations for all employees. Key skills:

- Operational benchmarking, budget variance analysis and strategic operational outlook
- Key performance indicator management, 80/20 analysis of production
- Revenue cycle management, regulatory compliance, litigation management
- GAAP accounting, reporting, bank covenant reporting

Retina Institute of Hawaii / Retina Institute Management Inc (<http://www.retinahawaii.com>)

CFO / President, Apr. 2012 to Feb. 2015

Integrated organization across Patient Centered Medical Home primary care physicians positioning organization for quality of care model from a volume based model. Coordination of care design allowed PCP's to attain HEDIS quality goals and payments. Physician recruitment and contract negotiations. Key skills:

- Practice management and revenue cycle management for a \$20M organization
- Medical billing, chart audit, physician benchmarking against Medicare utilization
- Community partnerships with PCP's, IPA's and other specialists
- Clinical audit, compliance and utilization review for PCP's and specialists
- GAAP accounting, reporting, bank covenant reporting

PlanetSun Hawaii – Kailua, HI

(<http://www.planetsunhawaii.com>)

Co-founder, Feb. 2008 to present

Developed a Hawaii-based company focused on sun protective products and education. First year sales of \$250K. Premier Hawaii sun protection line across all sports venues and alliance with UH Cancer Center.

Hawaii Medical Service Association – Honolulu, HI

(<http://www.hmsa.com>)

Enterprise Program Manager, Jun. 2002 to Mar. 2012

Completed HMSA's first executive trainee program held in 35 years to learn all aspects of business operations. Reported directly to the CFO managing special assignments for strategic and financial initiatives. Role at HMSA was to lead critical corporate projects, deliver confidential projects, facilitate internal communication across silos and analyze asset investments for strategic long-term growth opportunities. Co-wrote the \$16M Beacon Grant, HHIE collaboration and negotiated contracts with Microsoft, Tata Group, IBM, Healthways and many other strategic partners. Key skills:

- Health care finance and economics from daily responsibilities and developing HMSA's health care trends model with Milliman and S&P that governs the board, executive and Healthways bonus

models

- Expertise on various health care models including: PCMH, ACO, ACA, quality payment, population health management, episode of care, global payments, bundled payments and shared savings
- Implementation of emergency room electronic medical records and Queens and KuakiniER
- Health Care Program Management of over 250 people to develop the strategy, plan and implement the new core system replacing all systems across the entire company. Accountable for successful outcomes, costs, planning, vendor management, risk management, negotiations and all reporting
- Asset disposition and acquisition as part of a 3-person executive team to sale and reinsure the dental line of business in exchange HMSA's equity ownership in US Able Life across six BCBS companies
- Business process reengineering and change management as lead for the BCBS interplan, billing and membership departments

Primitive Logic, Inc. - Sausalito, CA

(<http://www.primitivelogic.com>)

Senior Consultant, Mar. 2000 to Feb. 2002

Primitive Logic is a boutique consulting company with a strong IT focus. My role was to grow the firm through my financial experience leading all business development activities. Responsibilities included the onsite engagement management ensuring value delivery, resource management and client management. Worked closely with executives across many large firms to strategically design their business model for the changing IT marketplace: CNET, ZDNet, Charles Schwab, Safeway, ProBusiness, VSP and more. Key skills include:

- Program Management Office design and implementation
- Sustainable business model design for executive leadership
- Business processes reengineering producing measurable operational efficiencies
- Facilitation across business and IT departments for both medium and large firms
- Due diligence for the \$1,600,000,000 integration of two large firms
- Auditing of corporate budgets for cost over-runs of a large system architecture redesign

Deutsche Banc Mortgage Capital, LLC - San Francisco, CA

(<http://www.corporatefinance.db.com>)

Vice President of Originations, Jul. 1997 to Feb. 2000

Led business development and origination for the West Coast office with annual volume in excess of \$300M. Managed the entire process in a team environment from upfront due diligence, site inspections, environmental and earthquake assessments, rate negotiations, underwriting and closing. Responsible for all contract negotiations and structuring of asset-backed transactions for securitization to Wall Street from fixed non-resource perm, mezzanine financing, bridge facilities, credit tenant and asset structures. Business development with over 150 new accounts established and Top West Coast Producer in 1998 and 1999. New account development in excess of \$6B. Still retain significant real estate contacts across the West Coast region. Key skills include:

- Interpersonal skills to solicit and close large complex transactions
- Contract negotiation across a variety of cultures and experience
- Commodity market understanding for placement of securitized debt
- Legal review of all contracts for rating agencies

University Of San Francisco - San Francisco, CA
Real Estate Project Manager, Aug. 1995 to Jul. 1997

(<http://www.usfca.edu>)

Development of 130 subsidized homes for faculty and staff in San Francisco valued at over \$40M. Responsible for design review, accounting, forecasts, communication to the Board of Directors, and execution of the capital budget. Identified and removed vendor over billings and was responsible for capital allocation to all vendors. Key skills:

- Real estate architecture and design review
- Contract negotiation

Hibernia National Bank - Baton Rouge, LA
Senior Credit Officer, Jul. 1992 to Aug. 1995

(now www.capitalonebank.com)

Structured asset-based loans to companies based on underwriting analysis of financial statement and developing projections. Set covenants and conducted detailed market due diligence to meet internal and regulatory compliance. Completed management trainee program and trained credit analysts on underwriting procedures.

EDUCATION

- **MBA** - University of San Francisco, San Francisco, CA, [REDACTED], Honors
- **MS Finance** -credits earned from Louisiana State University, Baton Rouge, LA, [REDACTED]
- **BS Finance** - Louisiana State University, Baton Rouge, LA, [REDACTED]

VOLUNTEER WORK and INTERESTS

- Chair of Windward Oahu State Health Planning and Development Agency (10+years)
- Member of State Healthcare Coordinating Council
- Chair of American Cancer Society Relay for Life and Windward Community
- Rotarian and Past President/Treasurer of Rotary Club of Honolulu Sunrise
- Past President of Friends of Lyon Arboretum
- Competitive endurance athlete with active participation in triathlons, adventure racing, ultra running and mountaineering