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Experience

2002 – Present Cogent Partners, LP — Dallas, TX

Co-Founder and Vice President

- *General Management* – Co-founder of the world's leading private equity investment bank. The firm has approximately 70% global market share for secondary advisory services and private equity fund research, representing more than $2.5 billion in transactions since early 2002. The founding team manages more than twenty professionals in Dallas, New York, London and Tokyo.
- *Investment Banking* – Lead deal manager on more than $650 million in secondary transactions involving approximately 80 private equity funds for institutional clients in the U.S., Asia and Europe during calendar year 2003. The above-market pricing on these transaction exceeded all client expectations and generated more than 60% of the firm's revenue in 2003.
- *Product Development* – Founder of Cogent Analytics™, the firm's private equity research and information analysis group. Ongoing responsibility for sales generation, employee recruitment, product enhancements and information systems development.
- *Sales & Marketing* – Responsible for marketing the firm's products and services to institutional investors in a defined geographic area. Primary account coverage includes more than fifty endowments, foundations, pension funds and other institutional investors with more than $30 billion in private equity assets. Sourced 45% of the firm's internally generated revenue in 2003.

2000 – 2002 The Crossroads Group — Dallas, TX

Senior Analyst

- *Primary Fund Investments* - Reviewed over 250 private equity fund primary and secondary investment opportunities and led in depth due-diligence on over 30 partnerships, which led to more than $200M in commitments. Established innovative quantitative fund assessment tools and frameworks. Analyzed investment performance for $2B of private equity investments and participated in fund advisory board meetings.
- *Direct Investments* - Developed analytic tools for direct investment assessment. Sourced investment opportunities from leading private equity firms; led in-depth due diligence on over sixty investment opportunities in the telecommunications, storage and security industries, resulting in two private company financings.

1999 - 2000 Get Fit Here, LLC — Fort Worth, TX

Founder and Vice President, Business Development

- Developed an electronic business services platform for participants in the $70 billion health & fitness industry and recruited senior managers to run the business until acquired by another private industry operator.

Publications

- "A Mosaic Secondary Transaction: A Case Study in Value Creation" (with Todd Konkel, CFA), *Private Equity International* (Routes to Liquidity Research Guide - March 2004)
- "Neeley University Investment Management Company" (with Professor George Chacko), *Harvard Business School Case* (Winter 2003)
- "Optimizing Private Equity Portfolios with Secondary Transactions," *The Venture Capital Journal* (July 2003)
- "Private Equity Portfolio Risk-Return Optimization," *Buyouts Magazine* (July 2003)
- "Helping Small LPs In Need - Proactive Solutions for Defaulting LPs," *Alt Assets* (September 2002)

Public Service

- Co-Founder and Director, Hope for the Holidays
- Mentor and Guest Lecturer, M.J. Neeley School of Business - Texas Christian University
- Mentor and Senior Advisor, Alaska Business Plan Competition

Education

1996 - 2000 Texas Christian University Fort Worth, TX

BBA cum laude in Finance and Accounting

- Recipient of the Dean's Outstanding Achievement Scholarship
- Elected portfolio manager for William C. Connor Foundation investment fund
- Completed the university's first independent study of the private equity industry
- GMAT: 760 – December 2003

2003 - Present Association for Investment Management and Research (AIMR)

CFA Charterholder