

# WAYNE K. JAMES

12345 Oak Street South | San Pedro, California 12345  
Home: 877.875.7706 | Mobile: 877.875.7706 | info@greatresumesfast.com

## EXECUTIVE CORPORATE FINANCE PROFESSIONAL

*Visionary corporate finance executive with the ability to achieve optimal economic capitalization through strategic planning and relationship management.*

Driven, bilingual, finance executive with expertise in business development, international accounting standards, risk assessment, acquisitions, mergers, and competitive market positioning, delivering positive outcomes with strong and sustainable gains. Talented and inventive professional with a proven track record of accelerating revenue growth through strategic and tactical development of structural operations to drive business growth and market development fostering performance improvement. Capitalizes on cross-functional team leadership examining economic trends and profitable areas of growth. Identifies and capitalizes on emerging business ventures to propel an organization to the top tier of its industry.

### Core Knowledge & Skills:

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|------------------------------|--------------------------------|--------------------------------------|
| ⇒ Operating Infrastructure   | ⇒ Corporate Finance            | ⇒ International Accounting Standards |
| ⇒ Mergers & Acquisition      | ⇒ Strategic Planning           | ⇒ Competitive Market Positioning     |
| ⇒ Risk Management            | ⇒ Organizational Leadership    | ⇒ Process Improvement                |
| ⇒ Implementation of BASIL II | ⇒ Capital & Operational Budget | ⇒ Due Diligence                      |

## PROFESSIONAL EXPERIENCE

CONFIDENTIAL, Mexico

2007- Present

### Corporate Director of Finance & Planning

Identified, analyzed, and captured opportunities for new business development, optimal economic capitalization, and market growth through successful strategic planning initiatives, structured operations, mergers, and acquisitions. Challenged to build new market presence and maximize cash flow, while reengineering and expanding existing ventures, increasing client base and improving corporate recognition. Researched, analyzed, and facilitated enterprise decision making processes creating corporate vision for long-term growth themes and holding company mediation. Conceptualized and served as Senior Finance Manager and Portfolio Strategist for the corporate pension fund and insurance company managing the allocation multi-million dollar funding portfolios. Directed and consolidated staff for corporate credit and leveraged finance, restructuring and investment processes improving performance and business initiatives.

#### Selected Accomplishments:

- **Increased capital ratio 2-3 points** through the successful analysis and completion of merger and acquisitions.
- **Increased sales 18%** through the implementation Business Intelligence Solutions creating cross-sale strategy.
- **Generated 7% beyond market returns** with the development of the Pension Fund.
- **Reduced merger costs \$40M** with expert understanding of structural finance and profitability.
- **Facilitated the completion of 2 successful mergers and several asset portfolio acquisitions** creating capital growth and expanding corporate presence.
- **Managed \$400M Corporate Pension Fund** creating potential for portfolio expansion.
- **Administered \$60M Corporate Insurance Company** creating security and profitability.

CONFIDENTIAL, Mexico

2004- 2007

### Executive Director- Planning & Finance Chief of Staff

Identified opportunity, structured partnerships, and captured emerging business ventures through strategic and business planning processes. Spearheaded the restructuring and reengineering of corporate compliance, operational risk, and control processes, creating accountability and profit improvement opportunities. Transitioned strategy into tactical plans developing procedures and policies to drive market growth. Consulted, monitored, and recommended implementation strategies and synergies in the microfinance sector.

#### Selected Accomplishments:

- **Conceptualized, developed \$35M pension fund special project** capturing new business opportunities through the expansion into previous untapped markets.
- **Expanded pension fund to \$100M.**
- **Connected 100 financial institutions** through the creation and implementation of the Remittance Network.

## PROFESSIONAL EXPERIENCE CONTINUED

**CONFIDENTIAL**, Dominican Republic **2003- 2004**  
**Independent Consultant- Risk & Finance**

Assessed and consolidated the Bank and Pension Funds Authorities for the Dominican Republic and Panama under IDB project. Streamlined operating infrastructure consolidating and strengthening regulatory, risk management, operational and performance processes. Orchestrated complex due diligence reviews in cooperation with banks to capitalize on long-term growth and profit improvement opportunities.

**Selected Accomplishments:**

- **Analyzed and managed 3 banks** establishing a comprehensive program of financial controls and accountability to improve performance.

**CONFIDENTIAL**, Mexico **2000- 2003**  
**Regional Director/ Senior Consultant**

Formulated and initiated extensive statistical and financial analysis utilizing data to create process improvement in credit processes, market and credit risk, and portfolio optimization. Evaluated, developed, and implemented corporate best practices to mitigate risk and net losses.

**Selected Accomplishments:**

- **Managed regional office for Mexico, Central America, and the Caribbean.**
- **Served as Project Leader for Nacional Financiera, Banco Pastor, Confederación de Cajas de Ahorro de España, La Caixa, Caja Libertad, and Financiera Rura.**

**CONFIDENTIAL INC.**, Mexico **2000**  
**Chief Financial Officer**

Conceptualized and originated an online business portal and financial ASP targeting Latin America. Contributed to all aspects of creation including recruiting, organization, and system establishment.

**Selected Accomplishments:**

- **Raised \$2 M from venture capital and private investors.**

**CONFIDENTIAL**, Mexico **1996- 2000**  
**Corporate Treasurer & Risk Manager**

Coordinated and administered treasury functions and cash management, in adherence to corporate sales, mergers, and due diligence processes. Examined and managed treasury, currency, and market risks executing investment strategies to obtain maximum profitability. Facilitated and managed corporate pension fund. Customized and implemented clearing house accounting processes and customer credit analysis programs to improve productivity and profit financing.

**Selected Accomplishments:**

- **Managed treasury in excess of \$150M** utilizing comprehensive internal controls.
- **Administered 4,000-employee pension fund.**
- **Coordinated \$75M in asset backed securitized operations.**
- **Managed \$15M equity swap,** examining and enhancing structured operations.
- **One of the 1<sup>st</sup> Treasuries in Mexico** to work actively with derivatives for creative hedgings.
- **Rated one of Mexico's Top 10** with the implementation of innovative treasury operations, systems, and processes.

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EDUCATION & PROFESSIONAL DEVELOPMENT

**UNIVERSITY OF CHICAGO**, Chicago, IL  
Master of Business Administration, Graduate Business School- Executive Program

**UNIVERSITY OF WARWICK**, Coventry, United Kingdom  
Master of Science, Economics and Finance- Business School

**INSTITUTO Tecnológico Autónomo de México (ITAM)**,  
Bachelor of Arts- Economics, Diploma in Risk Management

**Teaching Experience:**

**Universidad Autonoma de Nuevo Leon** **2008- Present**  
*Lecturer: Corporate Finance, Financial Analysis*

**Instituto Tecnológico Autónomo de México (ITAM)** **1996- 2002**  
*Lecturer: Managerial Economics, Macroeconomics, and Strategic Economics*