

EXECUTIVE SUMMARY

Proven commercial real estate investor and business leader with broad-based, multi-cycle experience in building, motivating and managing teams to source, underwrite, close, capitalize, develop and manage real successful estate investments. Key experience and capabilities include:

- Business Strategy & Leadership
- Business Development
- Divisional P&L Responsibility
- Fund Raising, Capital Strategy and Structuring
- Workout/Restructuring Debt & Equity
- Real Estate Investment and Development
- Investment Strategy
- Strong Market Relationships
- Team Building and Culture
- Business Technology
- Institutional Background
- Financial Analysis & Underwriting

EXPERIENCE**SABAL INVESTMENT ADVISORS, LLC**, Newport Beach, CA

Chief Investment Officer /Portfolio Manager /Founding Member *from October 2016*

Assisted in all aspects of the formation, investment strategy, fundraising, closing and management of \$200mm closed-end institutional real estate fund managed by a newly formed SEC registered investment advisor. Direct investment activity, investment management strategy and chair Investment Committee.

SABAL FINANCIAL GROUP, LLC, Newport Beach, CA

Chief Investment Officer; Chair, Investment Committee; Member, Executive Committee *from December 2010*

Established, expanded and lead successful real estate investment acquisition and management platform involving \$2.4 billion of acquisitions since 2010 encompassing over 4,000 commercial and residential real estate loans and real property throughout the US in 26 separate ventures. Peak platform headcount exceeded 130 employees. Partnered with leading private equity funds. Secured improving agency ratings of platform. Led team issuing over \$750mm of publicly traded, rated asset backed bonds.

PALISADES EQUITY PARTNERS, INC., Newport Beach, CA

Co-Founder & President *June 2009 – 2011*

Founded real estate investment and operating company to acquire West Coast office, multi-family and industrial debt and real property and provides advisory services to investors and corporate users. Acquired and sold \$15mm of investment property with private and institutional investors.

PARKER PROPERTIES, Orange County, CA

President *April 2005 - December 2008*

Co-managed the firm and increased revenue fivefold. Led business development, capital relationships/structuring, investment strategy, property/asset management, marketing/leasing and finance /administration. Managed overhead during firm growth with effective outsourcing. Developed 750,000 square feet of class A, LEED Silver-certified office. The firm sourced development and other investment opportunities to create tenant-oriented campus environments.

BUCHANAN STREET PARTNERS, Los Angeles, CA

Senior Vice President/Shareholder, Member Management Committee *August 2001 – April 2005*

Co-led advisory/agency team responsible for business development and advising, structuring and placing complex, structured debt and equity capital for real estate owners and developers.

AEW CAPITAL MANAGEMENT, Los Angeles, CA (formerly Copley Real Estate Advisors)

Vice President, AEW Partners Funds *November 1995 – June 2001*

Prospected, underwrote, negotiated, closed and managed high-yield private equity investments in the Western United States with average portfolio market value of over \$750 million.

- Directed investment underwriting and management of office, industrial, multifamily, residential, real estate operating companies and real estate technology companies structured as direct equity, operating company investments and joint ventures.

Vice President, AEW Institutional Real Estate Services

Overall strategic and P&L responsibility for over \$1 billion portfolio of industrial, office, retail investments located in the Western United States with improved property totaling over 15 million square feet.

- Sourced, closed and managed joint ventures. Directed asset dispositions totaling over \$1 billion.
- Closed capital investments for development of over one million square feet. Exceeded pro-forma returns.
- Member of Client Services/REIT value enhancement team responsible for advising and implementing strategies for clients on real estate M&A / IPO opportunities.

J.E. ROBERT COMPANIES, Los Angeles, CA (*Goldman Sachs & Company joint venture*)*Asset Manager**January 1994 - November 1995*

Investment responsibility for portfolio averaging \$300 million consisting of complex, non-performing commercial, multifamily and hospitality loans and real estate located across the United States.

- Acquisition underwriting and closing of over \$3 billion of assets. Successfully led negotiations, Goldman Sachs committee approval and transaction closings of over \$200 million resolutions. Initiated and coordinated loan portfolio sales.

GLENDALE FEDERAL BANK, Glendale, CA*Special Assets Officer, Special Assets Department**January 1992 - January 1994***ARCHITECT**, New York & Los Angeles*January 1987 - September 1990***ADDITIONAL**

ACADEMIC: *Adjunct Professor of Real Estate Capital Markets: The Paul Merage School of Business at UC Irvine; since 2002*

ASSOCIATIONS: ULI Full Member (IOPC-Green)

OTHER: Regular panelist and speaker on current real estate topics.
LEED Accredited Professional, New Construction
Licensed California Real Estate Broker

EDUCATION

MBA, Finance / Real Estate, 1992
The Anderson School at UCLA

BA, Environmental Design (Architecture), 1986
University of Colorado at Boulder