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Senior Associate

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EDUCATION

Indiana University - Kelley School of Business, M.B.A., Finance and Accounting, 2005

Arizona State University, B.S., Finance, 1999

PROFESSIONAL DESIGNATIONS

Accredited Senior Appraiser (ASA)

BUSINESS HISTORY

IPMetrics LLC (San Diego): Senior Analyst (2011-2016)

CONSOR Intellectual Asset Management (La Jolla, California): Senior Financial Analyst (2008-2011)

Ringel Kotzin Valuation Services (Phoenix): Valuation Analyst (2006-2007)

ALG Financial Advisors (Phoenix): Surveillance Analyst, Regional Management/Compliance (2005)

Charles Schwab & Co. (Phoenix): Registered Representative (2000-2001)

RANGE OF EXPERIENCE

BUSINESS AND INTANGIBLE ASSET VALUATION

Prepared comprehensive business valuation analyses with a focus on the valuation and licensing of intellectual property and intangible assets for litigation support and transaction advisory

Performed comprehensive appraisals of shareholder interests in closely held entities and qualified plans for estate tax, gift tax and other fiduciary tax reporting purposes

Performed extensive industry and competitor analysis across a broad spectrum of industries, including health care, food service, hospitality, banking, financial services, consumer goods, personal care products, wireless/mobile, and the entertainment industry

Reviewed historical and projected financial statements and performed detailed financial analysis and complex modeling to assess business risks and key value drivers

Collaborated with business owners and their senior management teams to understand and identify unique company specific risks and business value drivers

LITIGATION SUPPORT

Provided calculation of unjust enrichment, lost profits, reasonable royalty and corrective advertising damages associated with alleged trademark, copyright and patent infringement

Prepared rights of publicity damages analysis regarding the apportionment of economic profits, e.g., compensation paid to celebrities for brand value, endorsement/sponsorship value and exclusivity value components

Reviewed opposing experts' reports and depositions for the purpose of preparing rebuttal analyses and reports and accompanying cross-examination questions

Created and implemented financial models utilizing extensive *ad hoc* analysis in the context of assessing and quantifying economic damages

Performed in-depth industry research and analysis for supporting valuations, damages claims, and licensing customs and practices in a litigation context