

# NATHAN P. MCNAMEE

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EDUCATION	PhD in Finance / University of Surrey / UK MBA / University of Edinburgh / UK BSc, Business Management / Brigham Young University / USA	2014 – Present 2004 – 2005 2000 – 2002
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RESEARCH INTERESTS	Corporate Finance, Mergers and Acquisitions, Asset Sales, Sources of Financing, Method of Payment, Private Equity, Alternative Investments, and Asset Management
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WORKING PAPERS	‘Selling to Buy: Asset Sales and Method of Payment in M&As’, 2015 (with Christos Mavis, Dimitris Petmezas, and Nickolaos G. Travlos)  ‘Funding M&As Through Asset Sales: Balance Sheet Effect Vs Pecking Order Theory’, 2016 (with Christos Mavis and Dimitris Petmezas)  ‘Do Asset Sale Waves Lead to Merger Waves?’, 2016 (with Christos Mavis, Dimitris Petmezas, and Nickolaos G. Travlos)
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CONFERENCES	‘Selling to Buy: Asset Sales as a Source of Financing in Mergers and Acquisitions’ Post Graduate Research Conference, University of Surrey, UK, 2015
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RESEARCH SEMINARS	‘Selling to Buy: Asset Sales as a Source of Financing in Mergers and Acquisitions’ Finance and Accounting Department Seminar, University of Surrey, UK, 2015
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TEACHING & MENTORING EXPERIENCE	Corporate Finance (MSc) Seminars / University of Surrey / UK Corporate Finance (Undergraduate) Seminars / University of Surrey / UK Corporate Finance (Undergraduate) Guest Lecturer / University of Surrey / UK Mentor for Undergraduate Students / University of Surrey / UK <ul style="list-style-type: none"><li>Student quote: "I've just been offered a 3 month internship at JP Morgan...I just want to show my gratitude and thank you for all the help you have given me. I don't think I'd be in this position without your help, thank you!"</li></ul>	2015 – 2016 2016 2016 2015 – 2016
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INDUSTRY EXPERIENCE	President / Total Wealth Management / USA <ul style="list-style-type: none"><li>Oversaw operations, client service, investment analysis and selection, and financial reporting</li><li>Increased annual revenues by nearly 280% while President</li><li>Developed a series of seven private funds and led out on marketing and fundraising, raising over \$60 million in the first year</li><li>Led out on M&amp;A opportunity analysis and negotiation with two successfully completed acquisitions</li></ul> Corporate Finance and Accounting Consultant / Capita Advisors / USA <ul style="list-style-type: none"><li>Provided corporate finance consulting services to a number of corporate clients</li><li>Advised on optimal capital structure</li><li>Provided advice on accounting information systems management and managerial reporting practices</li></ul> Investment Advisor Representative / Soltis Investment Advisors / USA <ul style="list-style-type: none"><li>Provided financial planning services and investment advice for individual investors and institutions</li><li>Developed new web-based systems to capture and analyze client information</li><li>Served many of the firms largest corporate clients, working directly with company directors and fiduciaries</li><li>Responsible for significant client acquisition resulting in a ‘top 5’ client acquisition</li></ul>	2009 – 2013       2009 – 2013  2006 – 2009
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- Financial Controller / Wilkinson Electric, Inc. / USA 2005 – 2006
- Led the selection and implementation of a new accounting information system resulting in improved reporting capabilities
  - Worked closely with the CFO to prepare monthly, annual, and ad hoc financial statements and reports
  - Designed custom financial reports for CEO, CFO, and division managers to provide key, real-time information to better manage cash flow, job costs, and overhead allocations
  - Prepared documentation for tax preparation and liaised with third party tax advisors
- Financial Advisor / Merrill Lynch & Co. / USA 2002 – 2004
- Provided financial planning and investment advice resulting in an average annualized return of 16.8% in client portfolios, compared to the average annualized return of 3.1% of the S&P 500 over the same 24 month period
  - Received individual performance recognition for exceeding asset gathering goals
  - Led a small team of Financial Advisors, assisting them in portfolio analysis and development of creative client solutions
  - Selected as Regional Retirement Plan Advisor
- Financial Manager / Western Wats Market Research / USA 2001 – 2002
- Established new accounting systems and procedures, decreasing financial statement preparation time by half
  - Prepared financial statements and performed financial analysis and forecasting

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**TECHNICAL SKILLS**

- Proficient in use of computer applications including:
- SAS, Stata
  - Microsoft Office (Word, Excel, PowerPoint, Project)
  - Apple iWork (Pages, Numbers, Keynote)
  - SQL Database construction and maintenance
  - Crystal Report design
  - Salesforce CRM
  - Significant experience with the following accounting systems: Quickbooks, MAS 90, and Sage Timberline Office
  - Significant experience with the following web development and graphic design programs: Photoshop, Illustrator, Dreamweaver, and Fireworks

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**SERVICE**

- Calais Refugee Humanitarian Aid / LDS Humanitarian Services 2015 – 2016
- Participated on the organizing committee to bring aid to refugees in Calais and Dunkirk
  - Helped raise thousands of pounds in cash and food donations
  - Helped deliver 55 tons of food as well as 10,000 blankets and other supplies
- Chapter President / BYU Management Society 2012 – 2013
- Supervised communication and activity of society members within chapter
  - Raised thousands of dollars for need-based scholarships
- Chartered Organization Representative / Boy Scouts of America 2009 – 2013
- Provided volunteer leadership by overseeing 20 adult leaders and over 50 youth
  - Provided learning and character development for youth through various activities

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**PERSONAL**

- Guest Soloist (guitar) / Southwest Symphony / USA  
 Entertainer of the Year / Dixie State University / USA