

Curriculum Vitae

EDUCATION

Honours Bachelor of Commerce, with Distinction **2000**

McMaster University, Hamilton, ON

- Dean's List, 1997 – 2000
- Recipient of the Dr. H.L. Hooker and University Scholarships

Chartered Financial Analyst **2003**

Chartered Business Valuator **2003**

Masters of Business Administration **2006**

Queen's School of Business, Kingston, ON

Certified Management Accountant **2007**

- Top decile performance in every entrance exam subject

OTHER CREDENTIALS

Canadian Securities Course (CSC) **2000**

Conduct & Practices Handbook (CPH) Course **2001**

Canadian Securities Institute

Level II Security Clearance **2003**

Department of Justice, and Office of the Auditor General of Canada

TEACHING AND SEMINARS

Advanced Strategic Valuation **2008 - current**

Guest Lecturer, McMaster University MBA program

Planning & Managing the Ownership Transition **2008 - current**

Various Wealth Management seminars

PUBLICATIONS

To Infinity and Beyond: Exploring the Terminal Value Calculation **2006**

Business Valuation Digest

Canadian Institute of Chartered Business Valuators

Acquisitions & Divestitures of Private Companies **2007**

Chapter within the text 'Corporate Finance for Canadian Executives'

Carswell Publishing

EXPERT TESTIMONY

Lombard Financial Group, Inc. v. Davies & Co., 2005 ABQB 387

Court of Queen's Bench, Alberta

COMMUNITY INVOLVMENT

mDialogue Inc. (*Advisory Board*), Yee Hong Geriatric Care Facilities (*Finance Committee*),
Canadian Venture Capital & Private Equity Association (*Young Professionals Committee*).