



ACTIVE BAR ADMISSIONS – FEDERAL, STATE, AND LOCAL

Federal

United States Court of Appeals, Eleventh Circuit
United States Tax Court
United States Bankruptcy Court, M.D. Florida
United States District Court, M.D. Florida

State and Local

The Florida Bar – Bar No. 1038575
Miami-Dade Bar Association
Collier County Bar Association

PROFESSIONAL LICENSURE AND CERTIFICATIONS

Certified Public Accountant (CPA)

- Florida Division of Certified Public Accounting – Lic. AC49957 (Active)
- Texas State Board of Public Accountancy – Lic. 105825 (Active)

Certified Management Accountant (CMA) – Institute of Management Accountants – Cert. 61170 (Active)

Certified Internal Auditor (CIA) – Institute of Internal Auditors – Cert. 201138 (Active)

Certified Fraud Examiner (CFE) – Association of Certified Fraud Examiners – Cert. 1037806 (Active)

FORMAL EDUCATION

University of Miami School of Law – Coral Gables, Florida **Anticipated Graduation December 2023**

Master of Laws (LL.M.) in Real Property Development

- Attending on part-time basis via distance education (*i.e.*, remote, online learning) over three semesters
- Specialized post-graduate degree in Florida condominium and real estate development law

Ave Maria School of Law – Naples, Florida

Graduated May 2022

Juris Doctor (J.D.), *cum laude*

- Law Review: Editorial Board Member and Senior Editor (3L), Associate Editor (2L)
- Thesis selected for publication (see below under *Selected Publications*)
- Frances Xavier Cabrini Award, recipient; CALI Award, various subjects; Dean’s List, various semesters; full tuition merit scholarship, all semesters

Southern Methodist University, Edwin L. Cox School of Business – Dallas, Texas

Graduated May 2014

Master of Science (M.S.) in Accounting with Tax Concentration

Southern Methodist University, Edwin L. Cox School of Business – Dallas, Texas

Graduated May 2013

Bachelor of Business Administration (B.B.A.) in Accounting with Honors

- Completed undergraduate studies in *three years* (six semesters) resulting in early graduation
- Departmental honors, Caruth Institute for Entrepreneurship; distinguished senior recognition

SELECTED PUBLICATIONS

Transhumanism: Morality and Law at the Frontier of the Human Condition

May 2022

Ave Maria Law Review Volume 20; also available on Amazon

2021 Year End Tax Planning for Crypto Traders

December 2021

LinkedIn (self-published)

Non-Fungible Tokens: A New Way to Securitize Digital (and Real-World) Assets

June 2021

Entrepreneur Magazine

Finally, the Feds Are Cutting Startups Some Slack: Why the New Tax Law Is a Game-Changer

April 2018

Entrepreneur Magazine

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PROFESSIONAL EXPERIENCE

JPMorgan Chase & Co. – Dallas, Texas and Chicago, Illinois

Senior Associate, Financial Planning and Analysis (FP&A) – Commercial Banking

- **Provided financial modeling, including capacity modeling, supporting the Commercial Banking line of business (LOB) leveraging Qlikview, QlikSense, Tableau, and MS SQL Report Studio**
- Prepared quarterly business review (QBR) and executive management review (EMR) decks for presentation to LOB senior management highlighting KPIs (*e.g.*, deal cycle time); lead analyst for preparation of financial statements for commercial banking client onboarding team

American Airlines Inc. – Fort Worth, Texas

July 2016 to April 2019

Senior Financial Analyst (Team Lead): Corporate Real Estate and Legal

Selected capex projects:

FINANCIAL MANAGEMENT: CAPITAL INVESTMENT

- **Lead FP&A analyst for the corporate real estate capital budget comprising \$500 million+ in annual facility capital investment (domestic and international), including budgeting, forecasting, prioritization, and strategic long-term planning for airports**
- Authored and presented over 70 formal project proposals to the CFO to secure over \$990 million in facility investment using multivariate cash flow models incl. NPV, IRR, mIRR, WACC, and other measures
- Designed several new construction project cash flow forecasting models in Oracle Hyperion Essbase and Planning and Microsoft Excel
- Produced 20 ad hoc reports monthly, on average, using Tableau, Oracle Hyperion Essbase and Planning, SAP Financials/HANA, IBM Cognos, and SQL (MS SQL, MySQL, and Teradata) to forecast capital spend
- Served as liaison to IT finance to synchronize facility construction and information technology capital outlay for presentation to the controller
- LAX Terminal Redevelopment
Los Angeles, California
- LGA Terminal Reconstruction
New York, New York
- New AA Global Headquarters
Fort Worth, Texas
- BOS Terminal Redevelopment
Boston, Massachusetts
- DFW Future Terminal Study
Fort Worth, Texas
- SFO Terminal Redevelopment
San Francisco, California
- EU GDPR & California CCPA
Data Governance and Privacy Technology Implementation

FINANCIAL MANAGEMENT: OPERATING EXPENSE

- Managed the facilities lease operating budget for the world's largest airline encompassing \$1.6 billion in annual spend (3rd largest corporate P&L line), including ASC 842 implementation
- Performed the required monthly close, forecast, and reconciliation FP&A activities for facilities leases; generated variance explanations in a variety of formats (including waterfalls) for prior month and ROY activity for presentation to the controller to “tell the story” of the business unit
- Prepared an average of six funding packages each month for new and existing facilities for presentation to and approval by the CFO, including market comps, opportunity cost analysis, NPV, mIRR, and more
- Authored ad hoc lease and facilities investment reports using Costar Real Estate Manager

Food on the Fly LLC – Dallas, Texas

May 2015 to Present

Founder, Principal, and Lead Developer

STRATEGIC PLANNING AND FINANCIAL MANAGEMENT

- **Created first-to-market mobile ordering and delivery platform connecting time-constrained air passengers with existing food, beverage, and retail outlets in airports**
- Featured at Techweek NYC and LA keynote speaker as “Best of the Best” in Q4 2015
- Authored extensive 200-page business plan and operations manual articulating the market opportunity created by rebanking and network-wide schedule changes implemented by American Airlines and business concept, technical specifications, and financials to serve in discussions with external stakeholders
- Solicited seed funding from accredited external investors to fund development; handled day-to-day bookkeeping, including the preparation of GAAP financial statements and filings with tax agencies

TECHNICAL KNOWLEDGE AND OPERATIONS

- Wrote code as a full stack web and mobile application developer (HTML/PHP/Laravel, Javascript) and assisted in analysis and implementation of third-party APIs and packages, including Amazon Web Services (AWS), Twilio, Stripe, Omnivore, and FlightAware
- Applied knowledge of SQL database engineering to facilitate data mining and extrapolate revenue-driving relationships between operational variables
- Charted the long-term product roadmap to expedite continuous improvement of the customer-facing product by integrating recently commercialized technologies such as Web3, NFC, and ApplePay

PricewaterhouseCoopers LLP – Dallas, Texas

Associate – SALT-FS (Venture Capital and Private Equity Financial Services)

- **Delivered private equity tax compliance and consulting services to numerous high-profile financial services clients (see inset at right)**
- Special focus on multi-state corporate and pass-through entity many-tiered investment structures including AIVs, funds-of-funds, SPVs, and real estate distressed assets
- Architected sophisticated SQL (MS Access)-based compliance tracking database and web portal to streamline responses to compliance notices
- Successfully negotiated tens of thousands of dollars in tax abatements legally and ethically using professional tax research methods, requiring knowledge and application of the Internal Revenue Code, Treasury Regulations, and state tax law

July 2014 to July 2015

Selected engagements:

Texas Pacific Group
Fort Worth, TX
Goldman Sachs
New York, NY
Lone Star Funds
Dallas, TX
Neuberger Berman
New York, NY
HGGC
Palo Alto, CA

End of curriculum vitae