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EXPERIENCE

Harvard Business School, Boston, MA 2016 – Present
Senior Lecturer of Business
Full-time faculty member teaching in the Technology and Operations Management Unit at the Harvard Business School.

- Taught first year TOM (Technology and Operations Management) and first year LCA (Leadership and Corporate Accountability) to students.
- Created and teach a Family in Business MBA course and sponsor Independent Projects in this field to Elective Curriculum students.
- Co-Chair Executive Program on Families in Business, developed curriculum and teach in the program as well as the Family Office Executive program.
- Chair of Family in Business Club and active speaker and mentor.
- Teach in YPO, Family in Business Programs at HBS and nationwide.
- Published multiple articles for Harvard Business Review on Families in Business, held numerous Podcasts on the Family in Business Space and authored over twenty cases on Families in Business.

WINGSPAN, Global 2016 - Present
Created an advisor practice to help Families that are Families in Business prioritize family first and create succession strategies within the operating companies to fulfill family goals.

- Succession Planning for operating businesses and family offices
    - Multi-generational education
    - Best practices for family and non-family employees in both roles
- Asset allocation and risk mitigation
    - Estate planning
    - Foundation set up and administration
    - Tax Planning
- Formalizing and Documenting Family Priorities
    - Goal Setting
    - Creation of Family Constitutions
    - In-law policies
    - Reputation preservation strategies
    - Societal Responsibility
    - Customer Responsibility
    - Employee Responsibility
    - Shareholder Responsibility
- Governance
    - Board Configurations and best practices for operating companies, family offices and family foundations
    - Owner verses Manager Responsibilities

  - Created compensation committees and LTIP programs
  - Conducted 360 Board and Management reviews and help feedback sessions.

Family office, Palm Beach, FL and Boston, MA 2010 – 2016
President and CEO
Managed a family office and investments for a private asset management and organization representing a top Forbes individual and his family. The office consisted of over 60 full time employees in 5 locations. Assets encompassed: private companies, private equity and alternative investment funds, extensive real estate, museum quality art and wine collections, private aviation and other niche collectibles.

- Created a formal family office, upgraded staff and governance and set strategy for multi-generational support and improved tax efficiency.
- Reviewed and directed all new investments, asset allocation and asset structuring.
  - Represented family on eight private company boards.
- Managed existing portfolio of companies for growth and exit strategies.
  - Advised companies on human resources strategies and implementation.
  - Restructured company debt and assist in financing.
  - Assisted in portfolio liquidity.
- Managed portfolio of direct private equity investments.
- Continuously managed cash snapshot, debt refinancing and cost savings opportunities.
- Monitored private trusts for next generation and coordinated with trustees.
- Established estate planning and direct charitable giving strategy.
  - Created family limited partnerships.
  - Worked on establishing a private trust company.
- Managed private investment fund for 7 family members.

Founding Board Member of a High School 2010 – 2016
Participated in the formation of a high school that offers students the latest educational technologies to problem-solve, create, innovate and collaborate with many of the leading corporate and cultural institutions around the world.

- Assisted in developing the business plan.
- Active in fundraising for the school.
- Active in recruitment of talent.
- Assisted in financial aid and scholarship creation.

7X Cattle Company 2010 – 2016
CEO
Private, wholly owned cattle business producing the highest grade beef in America, launched the company.

- Managed team of ten in Colorado and Texas.
- Assisted in business plan and monitoring of expenses.
- Product is sold in over 75 restaurants and through an online direct to consumer internet site.

Wing O'Donnell Ventures, Boston, MA 2003 – Present
CEO

Independent investment management practice focused on asset allocation strategy including active management of key concentrated positions for several families.

- Manage existing investments and source new private investments.
- Manage outside asset managers and evaluate public market, fixed income and hedge fund recommendations.
- Manage family foundations and direct charitable giving.
- Create and execute tax strategies for optimal multi-generational families.
- Serve as a Trustee.
- Manage all outside legal and accounting firms.

edu.com, Boston, MA 2000 – 2003
CFO & Vice President of Finance and Operations
Held multiple roles and performed a variety of tasks in the building of the startup edu.com. Roles encompassed strategic, general management and implementation roles including: business development, corporate development, finance and operations. Reports included: finance, accounting, operations, legal, investor relations and human resources.

- Developed Series B financing strategy resulting in $30 million in financing from a combination of strategic and financial investors.
- Worked on negotiations with strategic investor and led the marketing relationship and integrated the two sites.
- Closed $4.5 million bridge loan.
- Selected investment bank for Series C round of financing. Designed financial model, private placement memorandum and investor presentation.
- Evaluated and recommended merger/strategic partnering alternatives.
- Directed financial and operational reviews of key units to identify internal control weakness and institute corrective policies and improved procedures.
- Monitored cash flow and short-term investments, supervised budget process.
- Managed board of directors and investor relations
- Conducted contract negotiations and was point person with outside counsel.

Goldman, Sachs & Co., New York, NY and Boston, MA 1998 – 2000
Associate, Equity Division
Conducted institutional sales and marketed securities services to large mutual funds and pension funds.

- Developed business plan to assist in the creation of a larger supply of securities, in order to improve recurring revenue business.
- Conducted business development for private client services.

Associate, Equity Division, New York, NY 1997
Worked as liaison between Equity Capital Markets and Institutional Sales.

- Worked on five-person equity team on the US$10 billion IPO of Deutsche Telekom.

New Harbor Incorporated, New York, NY 1995 – 1997
Associate, Mergers & Acquisitions

Performed complex quantitative analyses for energy services companies. Evaluated clients' business plans and financial forecasts to develop mergers and acquisitions opportunities. Spent a year in Australia, advising US companies on acquisition strategies during the privatization of the Australian utility industry.

- Developed financial valuation, coordinated domestic and international team and assisted in the negotiations with the Australian government for the successful privatization of a US$1.6 billion distribution acquisition by PacifiCorp.
- Represented PacifiCorp in the formation of a consortium of domestic and international partners for additional Australian based acquisitions.
- Worked on the reorganization of an electric utility emerging from bankruptcy and marketed $1.2 billion of high yield debt for the company.

Kidder, Peabody & Co., Inc., New York, NY 1993 - 1995
Financial Analyst, Corporate Finance
Performed financial analysis and valuations, identified strategic issues in preparation of internal recommendations and new business presentations. Focused on mergers and acquisitions in the energy sector.

- Created financial models, conducted due diligence and aided in the preparation of Board presentations and delivery of a fairness opinion in connection with a $1.3 billion energy services merger.
- Closed nine fixed income offerings including: preferred stock, MTN's, private placements and tax-exempt securities.
- Chosen by the review committee as a member of a six-person team to create and administer an intensive training program for the incoming 1994 analysts and associates.
- Spent the summers of 1991 and 1992 as an analyst in the Houston based Natural Resources Group evaluating industry financial statements and producing comparable company analysis.

EDUCATION

Harvard University – Harvard Business School, Boston, MA 1997 – 1998
Graduate School of Business Administration
Master's in Business Administration, June 1998. Elected Section representative for Student Careers and Clubs. Member of Investment Club, Venture Capital and Private Investment Club and the Women's Student Association.

Southern Methodist University, Dallas, TX 1989 – 1993
Bachelor of Business Administration degree, double major in Finance and Organizational Behavior and Business Policy. Appointed Chair of Hilltop Student Service Organization and elected Co-Chair of Student Senate Appropriations Committee. Studied abroad at the University of Salzburg.

PERSONAL

- A native of The Woodlands, Texas.
- Resides in Chestnut Hill, Massachusetts with her husband Tad and their three children.

- Enjoys golf, skiing, tennis, travel and volunteer work. Very active in providing educational opportunities to middle school students in the Boston area. Interested in politics, worked for two National Presidential Conventions and as a United States Senate Page in Washington, DC.

Charitable Board Seats:

- The Steppingstone Foundation, Chair of Advancement
- Aspen Junior Golf
- Operation Grateful Nation
- Nobles Long Range Planning
- Dexter/Southfield Advancement Committee
- Ambassador for The Home for the Little Wanderers – (Former)
- Harvard Business School Women’s Association – (Former)
- Oxbridge Academy Board Member – (Former)