JAMES T. KIRKLAND

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RESULTS-DRIVEN BUSINESS CONSULTANT & EQUITY INVESTMENT EXPERT

Investment Banking | Business Development | Corporate Operational Finance

High-impact Business Consultant with a strong ability to identify initiatives and facilitate action-driven plans to support corporate growth and objectives.

Finance professional with a proven record of evaluating business and investment opportunities, quickly understanding companies and their markets and making sound and profitable investment decisions. Expert in the identification and implementation of financial management strategies to capture cost improvement opportunities while impacting bottom line profits. Equally strong performance in new business development, growth and diversification.

CORE STRENGTHS & SKILLS

♦ Account Management	♦ Business Strategy	♦ Asset Protection	♦ Corporate Benefits
♦ Risk Management	♦ Strategic Partnerships	♦ Financial Management	♦ Performance Assessment
♦ Process Improvement	♦ Revenue Enhancement	♦ Entrepreneurial Initiative	♦ Client Acquisition & Retention
♦ Macroeconomic Planning	♦ Advanced Accounting	♦ Investment Banking	♦ Portfolio Optimization

FINANCIAL EXPERIENCE

VICE-PRESIDENT/WEALTH MANAGEMENT ADVISOR 2004 – 2009
Confidential Financial Corporation Houston, TX

Managed advisory services for Confidential Corporation, a boutiques benefits consulting and financial advisory firm servicing closely held business, not-for-profits and affluent client on matters related to employee benefit design, executive compensation, estate planning, risk management and wealth management. Led businesses in the strategic development and implementation of their corporate benefits program including executive compensation and risk management to tailor a plan to align with the needs of the company. Managed business risk by capitalizing on financial products to maximize wealth.

- Selected by a top industry producer to manage and grow an existing $10 million book of insurance and investment portfolio.
- Consistently generated more than $1 million in product revenue per year with individual sales ranging from $20K to $500K, and involving long and complex sales cycles.
- Design complex financial, estate planning, and businesses planning cases worth in excess $100 million
- Increased average revenue per sale 23% by shifting from traditional consulting model to an innovative macroeconomic planning process that used sophisticated planning software to better uncover, understand, and analyze and solve clients' needs.
- Roundtable Producer 2005-2008 (minimum of $90K in commission)
- Leader's Club Award, 4 years in a row, for superior revenues and client management.

SENIOR ASSOCIATE 2003 – 2004
Confidential Company Houston, TX

Built a financial planning practice from scratch on straight commission through aggressive prospecting, networking and referrals as well as strategic cold calling, warm lead follow-ups and targeted marketing campaigns. Collaborated with clients to identify financial goals and develop and implement need based financial plans including life insurance planning, disability income needs, retirement income planning, college tuition planning, money management, and estate planning among others.

- Completed a rigorous sales training program followed by ongoing career education, and a mentoring program.
- Generated over $50K of personal commission in first year ($100K in revenue).
- Acknowledged as in the top 20 of all new financial representatives in the country; received various company recognition awards including the Bronze Award, New Client Award, Pacemaker and a Crusade qualifier.

ASSOCIATE, TECHNOLOGY & COMMUNICATIONS BANKING GROUP 2000 - 2003
Confidential Financial, Corporate and Investment Bank Houston, TX
Member of four person transacting team charged with identifying and financing opportunities for companies in the technology and communications industry. Provided quantitative and qualitative analysis of prospective client operational performance and presented findings to Confidential Company to obtain approval to extend finance proposals. Facilitated meetings between prospective clients and internal products and services groups to develop complete solutions for clients, and maximize the relationship return.

- Key in generating revenue of $9 million in five transactions for 2001 totaling over $1 billion in commitments.
- Completed intense 12-week analyst training program with a two-year continuing education segment including intensive studies in advanced accounting, financial statement analysis, valuation, corporate finance, financial modeling, and credit analysis as well as two graduate level courses at Harvard University Extension School on the subjects of Business Analysis and Valuation, and Corporate Finance.
- Developed extensive valuation, bank deal and general industry comparable's database for communications space.
- Co-authored the banks bundled service provider (BSP) white papers.
- Promoted from analyst to highly technical Associate position within 19 months, which typically requires an MBA.

ADDITIONAL PROFESSIONAL EXPERIENCE

INDEPEDENT CONSULTANT 2009 – Present
APH Consulting Houston, TX
Worked with small groups of wealthy individuals to analyze potential business investment opportunities. Developed business and sales plan for unique business. Provided advisory sales strategies, prospect conversion from warm leads, marketing strategy, pricing, promotions, business plan, networking and targeted outreach.

- Consulted on best sales practices and sales conversion strategies for outsourced marketing firm for alternative investment management.
- Restructured sales activities to streamline process, including demo, pitch, timing, messaging, and call activity.

PROFESSIONAL DEVELOPMENT

BABSON COLLEGE, F.W. OLIN GRADUATE SCHOOL OF BUSINESS, Wellesley, MA
Candidate for Master of Business Administration May 2011. Enrolled in part-time Fast-Track program.

Harvard University Extension School, Cambridge, Massachusetts
February 2002 – June 2002

Graduate Level Courses Taken: Business Analysis and Valuation, Corporate Finance
Bachelor of Arts in Organizational Behavior & Management, 2000
Brown University, Providence, Rhode Island

PROFESSIONAL TRAINING & LICENSES

Confidential Financial Analyst Training Program, Houston, TX, February 2000 – May 2000

Licenses: 7, 63, 65, Life & Health