PAULA L. KARPATCH

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EXECUTIVE SUMMARY

Managing Director | Hedge Funds, Mutual Funds & Financial Services

Senior business development executive with a 12-year track record of success selling complex financial products and services to institutional investing firms. Able to identify, approach, and build "trusted advisor" relationships with senior decision-makers at targeted accounts—tailoring solutions and adapting the sales approach, as necessary, to maximize the revenue potential of each relationship.

KEY SKILLS & QUALIFICATIONS

- **CxO-level communications** and **relationship management** skills; able to close multi-million-dollar deals and establish key account control points
- Specialized background **selling to top decision-makers** at multi-national Asset Management firms (e.g. Hedge Funds, Mutual Funds, Investment Banks)
- **Expertise in Institutional Investment Products** and **Equities** (e.g. Microcap, Midcap, Large Cap, Growth, Value, Long, Short, Domestic, International)
- **High-energy, high-capacity work style**; able to assimilate large volumes of quantitative market data on a daily basis and use this information to make sound corporate decisions, often in fluid, rapidly-changing situations
- **Extensive network of personal relationships** that spans 200+ key influencers and decision-makers throughout the U.S. financial marketplace

EMPLOYMENT HISTORY

STUMPTOWN SECURITIES, Portland, OR — Aug 2005 to Present

Vice President, Institutional Equity Sales

Recruited to champion account growth and strategic relationship management for this leading investment research firm, specializing exclusively in the high technology sector

- Responsible for managing several of firm's largest accounts including Blackrock, Columbia, Janus, and JPMorgan. Lead strategy with regard to each firm, directing the resources of our firm (including a cross-functional team of internal salespeople, analysts, and traders) to achieve desired results.
- Appointed to Product Management team with responsibility for improving the firm's ability to monetize our financial research. Lead ongoing efforts to uncover deeper insight into our clients' needs, sharpen our research focus, and package our data in the fashion that is most useful/valuable to our clients.
- Responsible for significant upward tier moves at Janus, JPMorgan, Clearbridge, Thornburg, and Blackrock that resulted in 15% CAGR in revenues.
- Consistently receive the highest ranking in internal peer reviews from the firm's Syndicate and Research departments.

EMPLOYMENT HISTORY (cont'd)

TIGER EQUITY PARTNERS, Chicago, IL — Sep 2002 to Aug 2005

Principal, Institutional Equity Sales

Led sale of equities for this boutique investment research, advisory, and asset management firm – a member of the Kelly Goodwin family of companies

- Key contributor in growing and scaling this firm from initial start-up phase to a mature, profitable, and highly respected investment services provider.
- Responsible for managing several of firm's largest accounts, including Gartmore, T. Rowe Price, and Turner Investment Partners.
- Led strategic sales efforts that helped Tiger Equity achieve distinction as the fastest-growing U.S. Investment Bank in both 2003 and 2004.

SBF CAPITAL MARKETS, Chicago, IL — Jan 1999 to Sep 2002

Vice President, Institutional Equity Sales

- Drove ~20-25% annual revenue growth in Mid-Atlantic and Southeast regions.
- Responsible for delivering a suite of investment-related products and services, including daily research ideas, corporate access, IPOs, and secondary offerings.

HALLMARK CONTROLS GROUP, Milwaukee, WI — Jan 1991 to Dec 1998

Wisconsin Area Sales Manager (5/97-12/98)

- Consistently exceeded quarterly revenue targets by over 25%.
- Led a 14-member sales team responsible for generating $28 million annually.
- Member of management team responsible for re-engineering the strategies and operational planning process for Controls Group.

Account Executive (01/91-04/97)

- Consistently achieved margin results in top 10% of North American sales force.

COPELAND COMPANY/ENGINE DIVISION, Kohler, WI — Jan 1989 to Aug 1990

Industrial Engineer (Co-op)

EDUCATIONAL CREDENTIALS

UNIVERSITY OF CHICAGO, GRADUATE SCHOOL OF BUSINESS — Chicago, IL: 1998

MBA, Concentrations in Finance & Strategy

- Member of Finance Group; advise alumni/students on financial career options

UNIVERSITY OF WISCONSIN-MILWAUKEE — Milwaukee, WI: 1990

BS, Industrial Engineering

Industry Licenses: Series 7, Series 63

ADDITIONAL INFORMATION

Computer Proficiency: MS Office (Word, Excel, PowerPoint, Outlook); OneNote; ThomsonONE; Vision (CRM); Social Media Familiarity (Facebook; LinkedIn)