

Resume Packet

NO.	STUDENT	GRAD DATE
1	Alliegro, Lauren	May 2018
2	Anderson, Joseph	May 2018
3	Aptekman, Alexandre	May 2018
4	Barbour, Charnice	May 2018
5	Calderwood, James	May 2018
6	Carlton, Timothy	May 2018
7	Certo, Gregory	May 2018
8	Chen, Angelinda	May 2018
9	Delaney, Matthew	May 2018
10	Gavai, Gavai	May 2018
11	Goldrick, Christine	May 2018
12	Haimm, Ethan	May 2018
13	Handley, Nathan	May 2018
14	Jaggia, Dhruv	May 2018
15	Jayakumar, Kishore	May 2018
16	Jethwani, Pankaj	May 2018
17	Jones, Alexander	May 2018
18	Kain, Alexander	May 2018
19	Karyeva, Inna	May 2018
20	Li, David	May 2018
21	Lipkin, Nathan	May 2018
22	Lytte, Michael	May 2018
23	Marks, Clifford	May 2018
24	McComish, Julie	May 2018
25	Miller, Lauren	May 2018
26	Muller, Brent	May 2018
27	Ostler, Joshua	May 2018
28	Rashtchi, Roya	May 2018
29	Robison, Amanda	May 2018
30	Segner, Julie	May 2018

NO.	STUDENT	GRAD DATE
31	Sekar, Anita	May 2018
32	Tashiro, Kengo	May 2018
33	Ting, Michelle	May 2018
34	Toman, Allison	May 2018
35	Valdes, John Xavier	May 2018
36	Zhou, Yan	May 2018

LAUREN ALLIEGRO

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EDUCATION

THE WHARTON SCHOOL, UNIVERSITY OF PENNSYLVANIA

Philadelphia, PA

Master of Business Administration Candidate; Major in Marketing & Operations

2016-2018

- GMAT 770 (99th percentile); awarded William T. Morris Foundation Fellowship for academic and professional accomplishments
- *InSITE Fellow*: national program connecting top grad students active in Entrepreneurship, VC & Tech with early stage startups
- Dean's Graduate Student Advisory Committee, Welcome Committee, GUIDE Undergraduate Mentor; Member of Tech Club, Innovation & Design Club, Data & Analytics Club

PRINCETON UNIVERSITY

Princeton, NJ

Bachelor of Arts from the Woodrow Wilson School of Public & International Affairs

2007-2011

- GPA: 3.75/4.0
- Peer Academic Advisor; Co-Chair, Residential College Council; Charge de Affaires, International Relations Council; Secretary, Women's Club Lacrosse Team
- 2nd place startup grant winner, 2011 Princeton Class of '76 Green Business Competition
- Princeton in Asia Fellow, Summer 2010: Planned and co-led English program for 120 university-level students in Hunan, China

EXPERIENCE

BIRCHBOX

New York, NY

Digital Product Manager

Nov 2015-June 2016

- Led product development for Birchbox Man, a \$30M vertical with 70K monthly subscribers, spanning acquisition and onboarding, membership and engagement, and ecommerce shop experience on desktop, mobile web, iOS and Android
- Conducted user research, prototyping, and usability testing to evaluate needs within the Men's market, resulting in the definition of a new subscription product and online experience
- Presented business case to executive team, leading to approval of budget and resources for testing
- Managed cross-functional team of 6 software engineers, UX designers, and marketers to develop user stories, draft technical specifications, and launch beta test of the new concept within 6 weeks
- Drove continual iteration over 5-month beta by leveraging A/B testing, interaction data, and user feedback to prioritize features, resulting in 125% join conversion lift, 20% lift in visits/member, and 20% increase in NPS over control experience
- Selected by CEO as Commissioner for annual all-company strategy and teambuilding retreat; position given to non-executive team member demonstrating sustained business impact, leadership potential, and representation of company core values

Senior Manager, Business Development and Strategy

Jan 2015-Nov 2015

Manager, Business Development and Strategy

Nov 2013-Jan 2015

- Led design and execution of 10+ strategic marketing partnerships, managing cross-functional teams from Creative, Tech, Editorial, Marketing and PR to generate 5B+ impressions and 25K+ new subscribers
- Developed store-in-store retail strategy to support brick and mortar expansion; pitched, structured and led execution of deal with Gap in summer of 2015, featuring Birchbox pop-ups in 7 Gap locations across the U.S.
- Launched partnership to provide branded amenity kits to JetBlue customers; managed product design, sourcing, manufacturing, distribution, and deal renewal in 2014, securing additional margin and incremental co-marketing commitments

ACCENTURE

New York, NY

Consultant, Global Strategy

Aug 2013-Nov 2013

Business Analyst, Management Consulting

Aug 2011-Aug 2013

- Earned highest possible rating at year-end and promotion to highly selective Global Strategy group in 2nd year
- Served as assistant to President of Accenture North America Talent Council – launched executive “brown bag lunch” initiative for analysts; planned and facilitated quarterly NA Town Hall webcasts reaching ~1000 employees
- Growth Strategy for Pharmaceutical Company: Built financial model and designed new resourcing strategy to improve sales performance at large hospital networks; led to launch of 50 new roles at accounts comprising 30% of U.S. business
- Direct-to-Consumer Marketing Plan for Healthcare Brands: Developed consumer marketing channel mix framework and conducted ROI analysis to optimize brand investment; implemented by 3 pharmaceutical brands with \$500M+ in revenue

ADDITIONAL INFORMATION

- **Community Involvement**: Jr. Board Member, Youth Represent (youth advocacy nonprofit); Chair, Birchbox DoGood Division
- **Skills**: SQL, Jira, Google Analytics, Looker; working knowledge of Python, HTML, and CSS
- **Interests**: Traveling Asia (Vietnam, Thailand, Laos, China to date), skiing, street food, podcasts (This American Life, Radiolab)

JOSEPH ANDERSON

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EDUCATION

THE WHARTON SCHOOL, UNIVERSITY OF PENNSYLVANIA

Philadelphia, PA

Master of Business Administration Candidate; Major in Healthcare Management

2016-2018

- Recipient of **Herman O. West Fellowship** recognizing accomplishments, exceptional character, integrity, and leadership.
- Recipient of **Kaiser Fellowship** recognizing professional accomplishments and potential for future achievement
- Academics Representative, Cluster Council; Member of Wharton Venture Partners – Healthcare, PEVC club, IM Club, Healthcare Club, Ski & Snowboard Club, and Wildmen Hockey

VANDERBILT UNIVERSITY

Nashville, TN

Bachelor of Arts, Major in Mathematics and Economics, Minor in Financial Economics

2007-2011

- **College of Arts & Sciences Honors Scholar**: Dean's Select Academic Merit Scholarship awarded to top 25 incoming freshmen

EXPERIENCE

EVOLENT HEALTH

Arlington, VA

Associate Director, Corporate Development

2015-2016

Senior Financial Analyst, Corporate Development

2014-2015

- Identified key strategic initiatives and product development areas through extensive market, sector, and product research culminating in recommendation to pursue managed Medicaid services to board of directors
- Spearheaded quantitative and qualitative target screening process to identify short-list of acquisition candidates in the managed Medicaid space
- Completed \$15M acquisition of a managed Medicaid services organization carve-out
 - Led financial diligence including valuation, synergy analysis, and M&A modeling
 - Managed third party service providers including target and Evolent legal counsel through deal process
 - Developed 100-day go-to-market strategy for new managed Medicaid services product
- Completed \$220M acquisition of competing value-based healthcare technology and services company
 - Collaborated with target management team to gather data required for financial due diligence
 - Conducted detailed valuation analysis to arrive at economically viable purchase price
 - Built pro-forma statements and accretion/dilution model to determine optimal capital structure and funding sources
 - Managed interdepartmental team of 5 and third party advisors throughout due diligence process
- Developed Total Addressable Market (TAM) methodology and drafted TAM, Competitive Landscape, and Partner Case Studies sections of Evolent's S-1 and investor roadshow deck
- Introduced novel performance-based payment and risk-sharing terms in order to close partnership with state-wide population health alliance expected to generate \$5M in annual revenue
- Led pricing strategy session to communicate Evolent partnership structuring and pricing strategy to multiple go-to-market stakeholders including business development, marketing, and operations resulting in unified messaging to prospective clients
- Negotiated and drafted long-term partnership operating agreements for 5 clients resulting in ~\$80M in recurring revenue

DELOITTE CONSULTING

Atlanta, GA

Consultant, Strategy and Operations

2011-2014

- Rated in top 20% of Business Analyst class
- Initiated strategic review of Banking and Securities product offerings relative to market opportunity and collaborated with leadership to focus sales efforts on digital capabilities including big data analysis and large scale enterprise IT transformation leading to sale of \$25M IT transformation engagement to a top 3 global retail bank
- Led global Retail Banking client in collecting data from bank's business and technology stakeholders and synthesized data into quantitative and qualitative business case establishing economic viability of a \$300M+ IT transformation
- Steered healthcare reform related integration workstream for \$6B health plan acquisition and identified cost efficiencies through benchmarking and span of control analysis resulting in 24% savings in the 24-hour nurse hotline cost center
- Devised economic feasibility analysis on accountable care organizations and persuaded Client Account leadership to pitch related services to client sponsor resulting in SOW for client specific assessment

ADDITIONAL INFORMATION

- **Interests:** The Arts, golf (S. Florida Jr. Champion), soccer (Florida State Champion, 2x Intramural Champion), distance running, big mountain snowboarding

ALEXANDRE APTEKMAN

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EDUCATION

THE WHARTON SCHOOL, UNIVERSITY OF PENNSYLVANIA

Philadelphia, PA

Master of Business Administration Candidate; Major in Health Care Management

2016-2018

- VP of Analytics, Wharton Digital Health; Member of Health Care, PE/VC, and Innovation and Design Clubs

SCHULICH SCHOOL OF BUSINESS, YORK UNIVERSITY

Toronto, Canada

Bachelor of Business Administration, Major in Finance

2005-2009

- Finished in top three percent of 313 student graduating class; Dean's List and continuing scholarships; 95% entrance average
- President & Co-Founder, Business Law Association; Portfolio Manager, York Finance Club; VP of Training, DECA
- JP Morgan, Hong Kong – Summer Internship; Manchester Business School, Manchester – Semester Abroad

EXPERIENCE

DW HEALTHCARE PARTNERS

Toronto, Canada

Chief Executive Officer (Interim), Canadian Addiction Treatment Centres

2016

Chief Financial Officer (Interim), Canadian Addiction Treatment Centres

2015

Vice President, Private Equity

2016

Senior Associate, Private Equity

2015

Associate, Private Equity

2013-2014

Canadian Addiction Treatment Centres (Portfolio Company)

- Appointed CEO by board of directors of the largest provider of addiction treatment services in Canada (75 clinics and over 500 employees) after spending four months as CFO, while managing a change in reimbursement that initially cut profits by over 90%
- Renegotiated physician compensation packages based on clinic profitability and individual performance, and reallocated patients to the strongest performers; drove a 60% increase in profits – ensuring the Company did not go into bankruptcy
- Led acquisition of largest competitor and buildout of two clinics in strategic geographies, increasing market share to 50% in Ontario
- Cut operating hours of 60 clinics (matched U.S. benchmarks); resulted in profitability increase of 25%
- Built billing collections report to track collections on a monthly basis by-physician; decreased uncollected billings by 75%

Leadership Initiatives

- Executed ten North American healthcare acquisitions, led portfolio company strategic and operational initiatives, and focused on financial modeling, due diligence, negotiating with lenders, and managing associates and business development personnel
- Built firm's associate training program and organized partners from KPMG and Torys to conduct accounting and legal workshops
- Increased proprietary deals sourced in 2015 by 10% by creating performance tracking framework for the business development team

Selected Transactions & Strategic Initiatives

- Acquired Cardinal Health's Canadian radiopharmacies and Pharmalogic P.E.T. Services (renamed Isologic)
 - Negotiated with BMO to restructure loan, securing financing for the acquisition of Isologic's largest competitor, Lantheus
- Acquired Daybreak and Unified Care, service providers to individuals with developmental disabilities (renamed Caregiver)
 - Identified 150 add-on companies for Caregiver; initiated diligence on three that could increase revenues by 50%
- Developed business case that resulted in joint ventures between Canadian Addiction Treatment Centres, and pharmaceutical companies, Gilead and AbbVie, to administer Hepatitis C treatment; 100+ patients have since been cured
- Secured Isologic's rights to one of the world's only Alzheimer's diagnostics; can change management of 750,000 suspected cases

UNION SQUARE ADVISORS

San Francisco, CA

Senior Investment Banking Analyst

2011-2012

- Key transaction: \$500 million sale of DemandTec, a cloud-based analytics software provider, to IBM
- Spearheaded the big data and analytics initiative; worked on all Union Square deals in this space and created research materials for strategic and financial buyers, including Dell, IBM, HP, and Vista Equity Partners that helped inform their acquisition strategies

BANK OF AMERICA MERRILL LYNCH

Toronto, Canada

Investment Banking Analyst

2009-2010

- Ranked in top five percent of 350 analyst incoming class; 98% on quantitative exams and case studies in Global Training Program
- Key transactions: Kinross Gold's \$1 billion notes issuance, Hochschild Mining's sale of \$400 million stake in Lake Shore Gold

ADDITIONAL INFORMATION

- **Interests:** Vinyl record collection of 2,000+ from 20+ countries, university intramural basketball team captain, Wharton Hockey Club
- **Positions:** Apollo Theater, *Young Professionals Board Member*; Fashion Heals for SickKids, *Founder & Co-Chair*
- **Languages:** Russian

CHARNICE BARBOUR

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EDUCATION

THE WHARTON SCHOOL, UNIVERSITY OF PENNSYLVANIA

Philadelphia, PA

Master of Business Administration Candidate; Major in Health Care Management

2016-2018

- Recipient of Peggy J. Koenig Endowed MBA Fellowship for outstanding academic and professional accomplishments
- Clubs: Return on Equality, Analytics Board Member; Whitney M. Young Jr. Conference, Operations Chair; Wharton MBA Finance Club, Member; Wharton Public Speaking Club; Member

THAYER SCHOOL OF ENGINEERING AT DARTMOUTH COLLEGE

Hanover, NH

Master of Engineering Management

2010-2012

- One of five students out of 48 awarded high honors for independent culminating research project

Bachelor of Engineering, Concentration in Biomedical Engineering

2010-2011

- Patented a shoulder implant (US 20140128983) as part of culminating capstone engineering project
- Clubs: National Society of Black Engineers, Pre-Collegiate and Alumni Chair
- Employment: Novack Café, Student Manager

DARTMOUTH COLLEGE

Hanover, NH

Bachelor of Arts, Engineering Sciences Major and International Studies Minor, 3.44

2006-2010

- Completed two study abroad semesters in Rome, Italy and Bangkok, Thailand
- Clubs: Afro-American Society, Financial Secretary; Tucker Foundation, Katrina Service Trip Member
- Employment: Dean's Office, Student Consultant; Novack Café, Student Manager; Solid Mechanics, Teaching Assistant; Women in Science Project, Intern; Dartmouth College Admissions Office, Intern

EXPERIENCE

TRINITY PARTNERS: A global life sciences strategic consulting company

Waltham, MA

Consultant

2014-2016

Senior Associate Consultant

2014-2014

Associate Consultant

2012-2013

- Conducted market research, data analyses, and due diligence for 45+ projects, serving over 20 leading and emerging pharmaceutical, medical device, and biotech companies in key therapeutic areas such as oncology and diabetes
- Examined yearly results from an Awareness, Trial, and Usage (ATU) quantitative survey to assess and ameliorate access issues for a \$94B pharmaceutical company's four oncology agents. Project resulted in redirection of company's strategy
- Managed a \$350K project and day-to-day activities of a team of two identifying levers in the oncology treatment paradigm prior to product launch to help with regulatory submission and clinical trial activities for a \$2.6B pharmaceutical company
- Determined potential market share, target consumers, and marketing materials of an anti-infective drug for a \$7B company by interviewing key consumers and analyzing data from a large international survey
- Constructed model to help VP of Analytics of a \$260M company forecast sales and volume for newly launched pain product
- Restructured internal New Hire Mentoring Program by outlining guidelines and objectives concentrated on associate development such as effective communication, time management and professional presence
- Co-coordinated two-week training period for new hires and redeveloped new hire project by updating materials and increasing cross-company involvement. Improvements revealed higher new hire employee satisfaction compared to previous year
- Supervised summer intern project focused on merger and acquisition trends of healthcare companies for internal database

VETERANS ADMINISTRATION MEDICAL CENTER

White River Junction, VT

Veterans Engineering Center Intern

2011

- Collaborated with diverse healthcare professionals to improve the efficiency of the Compensation and Pension examination program to determine optimal number of clinicians needed to fulfill patient demand
- Evaluated patient and clinician data and presented recommendations on how to effectively utilize staff to reduce costs by 10%

ADDITIONAL INFORMATION

- **Management Leadership for Tomorrow (MLT)**, Ascend Coach, MBA Prep Fellow, PD Fellow 2015-Present
- **Skills:** SPSS, Extend
- **Interests:** Zumba, hiking (Mt. Etna, Mt. Moosilauke), watching documentaries (What Happened, Miss Simone?)

JAMES CALDERWOOD JR, RN

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EDUCATION

- THE WHARTON SCHOOL, UNIVERSITY OF PENNSYLVANIA** **Philadelphia, PA**
Master of Business Administration Candidate; Major in Health Care Management **2016-2018**
- Member of Wharton's General Management Club, Agribusiness, Wharton Leadership Ventures, Rugby
 - Vice President of Social for Health Care Club
- THE WHARTON SCHOOL, UNIVERSITY OF PENNSYLVANIA** **Philadelphia, PA**
Bachelor of Science in Economics **2007-2012**
- THE NURSING SCHOOL, UNIVERSITY OF PENNSYLVANIA** **Philadelphia, PA**
Bachelor of Science in Nursing & Registered Nurse **2007-2012**

EXPERIENCE

- THE ADVANCED MEDICAL TECHNOLOGY ASSOCIATION (AdvaMed)** **Washington, DC**
Policy Analyst, Payment and Health Care Delivery Policy **2012-2016**
Research Associate, Payment and Health Care Delivery Policy
- Took initiative to learn R statistical suite to analyze 9 million line CMS data base and create customized member financial/marketing reports; saved \$150,000+ in consulting fees
 - Developed and presented three payment models based on interpretations of CMS Proposed Rule to project financial impacts to members and forecasted major industry changes
 - Assisted in managing a balanced research budget of over \$1 million based upon AdvaMed's Strategic Pillars
 - Aided medtech start-ups in navigating FDA, CMS, and private payer spaces
- UNITED STATES SENATE** **Washington, DC**
Barbara Jordan Health Policy Fellow Sponsored by Kaiser Family Foundation **2012**
- Supported policy issues including healthcare reform, Medicare, Medicaid, and Native American Affairs
 - Consulted Senator on host of topics including drinking water, organ donation, HIV/AIDS, pharmaceuticals and raw milk
 - Presented to Congressional staff on potential effects of sequestration to the Indian Health Service and how to mitigate them
- AGASTON URBAN NUTRITION INITIATIVE** **Philadelphia, PA**
Quantitative Research Head **2010**
- Developed evaluation strategy (administered questionnaires, led focus groups, and provided statistical analyses) to determine program efficacy and presented findings to the Board
 - Recommended incorporating family and personal finance skills; many of which were included in future programming

HONORS AND AWARDS

- **Greenland and Canadian Arctic**, Explorers Club Research Fellowship, history of Arctic people's tool development, 2016
- **President's Volunteer Service Award**, from President Obama for typhoon relief with US military in Philippines, 2014
- **University of Pennsylvania Innovation Grant Recipient**, received to design a safer IV pump, 2012
- **Hyderabad, India**, Wharton trip on healthcare innovation (chapter published in *India's Healthcare Industry*), 2011
- **Wharton Leadership Ventures Board**, non-profit consulting in Mexico (leader), Patagonia and Grand Teton, 2008-2012
- **Wharton Cohort System Board**, elected Cohort Representative and Mentor, 2007-2010
- **Explorers Club**, four Flag Expeditions; grant recipient; elected to Membership Committee, 2006-present
- **Person of the Week on ABC's World News Tonight with Charles Gibson**, interviewed on CBS's *The Early Show*, Fox News, and NPR+30 other radio stations; stories ran in *The Washington Post* and other publications, 2007
- **Eagle Scout and Order of the Arrow**, 2005

INTERESTS: Traveling and volunteering in 30+ countries, rugby, Explorers Club, wildlife conservation, sailing (won Philadelphia Cup 2011), climbing, blacksmithing, mechanics, wood working, mechanics and home repair

TIMOTHY CARLON

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EDUCATION

THE WHARTON SCHOOL, UNIVERSITY OF PENNSYLVANIA

Philadelphia, PA

Master of Business Administration Candidate; Major in Healthcare Administration

2016 – 2018

- Awarded merit-based Kaiser Fellowship for exceptional professional, academic, and personal achievement
- Member of Wharton's Health Care, Digital Health, Consulting, Ski and Snowboard, and Scotch and Whiskey clubs
- Team-Leader, Philadelphia VA Medical Center Quality Improvement Consulting Project. Coordinate a team of four Wharton MBA students advising the Philadelphia VA total joint replacement program on strategies to reduce the incidences of artificial joint infection and day-of-surgery procedure cancellation
- Value-Based Care Group, Wharton Health Care Business Conference Content Committee. Set scope and provide initial discussion questions for the value-based care panel. Identify, invite, and assist the panelists and moderator

PERELMAN SCHOOL OF MEDICINE, UNIVERSITY OF PENNSYLVANIA

Philadelphia, PA

Doctor of Medicine Candidate

2013 – 2018

- Member, School of Medicine Admissions Committee. Reviewed completed application files, including all letters and interview notes for admission to the Perelman School of Medicine MD and MD/PhD programs
- Teaching Assistant, *Gross Anatomy* and *Student Report*, a monthly medical case conference for first and second year medical students. Guided and mentored preclinical students through anatomic/functional relationships and clinical decision making

DUKE UNIVERSITY

Durham, NC

Bachelor of Science in Engineering; Major in Biomedical Engineering, Minor in Chemistry

2009 – 2013

- Graduated *summa cum laude* with departmental distinction in biomedical engineering. Awarded Howard G. Clark award for top graduation-with-distinction research presentations. Elected as a junior to Tau Beta Pi, the national engineering honor society. GPA 3.96/4.00
- Teaching Assistant, *Computational Methods in Engineering* (3 years) and *Biomedical Electronic Measurement I* (2 years)

EXPERIENCE

COMPUTATIONAL BREAST IMAGING GROUP

Philadelphia, PA

Graduate Researcher

2014

- Project title: *Imaging Biomarkers for Risk Management of BRCA 1/2 Carriers*
- Authored MATLAB code for automated analysis of breast MRI images with the goal of quantifying risk of future breast and ovarian cancers in asymptomatic women with BRCA 1 and BRCA 2 mutations
- Implemented substantial improvements in efficiency (reduced run time by 50%), consistency (reduced failure rate from 25% to <5%), and readability (added extensive comments and help files to >10 programs) to previously developed algorithms in preparation for analysis of larger, more diverse image datasets
- Coordinated with post-doctoral researchers by providing clinical context to direct appropriate applications of novel algorithms. Presented results to the principal investigator, guiding future direction of the project

HEART HEALTH BRIDGE TO CARE (HHBC)

Philadelphia, PA

Treasurer and Medical Student Coordinator

2013 – 2014

- Provided free preventative medical care to uninsured and underinsured individuals with chronic cardiovascular disease living in Philadelphia's East Parkside neighborhood as part of a supervised, multidisciplinary clinical team
- Planned and managed annual clinic budget of \$10,000 providing laboratory tests, medications, and educational materials free of charge for all clinic patients. Authored grant applications to maintain clinic quality of care and ongoing viability
- Awarded \$10,000 grant from Independence Blue Cross allowing HHBC to operate independently from its larger sister clinic

ADDITIONAL INFORMATION

- **Technical Skills:** Mastery – MATLAB, Microsoft Office; Experience – JMP, LabVIEW, LaTeX
- **Interests:** Skiing, scuba diving, trivia, crosswords

GREGORY CERTO

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EDUCATION

THE WHARTON SCHOOL, UNIVERSITY OF PENNSYLVANIA

Master of Business Administration Candidate; Major in Health Care Management

Philadelphia, PA
2016-2018

- Awarded Kaiser Fellowship based on strength of application
- VP Careers, Wharton Digital Health Club
- Board Member, Wharton Aviation Club
- First Place Team, Wharton Big Idea Innovation Tournament

DARTMOUTH COLLEGE

A.B. Chemistry, Religion

Hanover, NH
2008-2012

- Religion Department Faculty Award, awarded to a graduating senior who has done outstanding work throughout his or her career as a Religion major, as determined by the Religion Department faculty
- Captain, Dartmouth Men's Club Lacrosse - Player/coach for club team without head coach
- Howard Hughes Medical Institute Fellowship, Dartmouth College, Spring 2010
- Officer, Dartmouth Chemistry Society - Identified, contacted, and scheduled guest professors for Society dinners
- Religion Foreign Study Program – New College, University of Edinburgh

EXPERIENCE

LOCUST WALK PARTNERS

Analyst

Boston, MA
2014-2016

- Evaluated and supported buy- and sell-side biopharmaceutical transactions: identified targets, wrote management presentations, completed commercial landscaping, built financial models, wrote term sheets
- Built detailed financial model and assessed deal scenarios for \$12B public company; supported potential \$20M in-licensing opportunity of commercial stage product in the hospital space
- Executed Commercial Assessment and Asset Valuation of orphan oncology asset, enabling decision on furthering investment vs. conducting a business development process for public company
- Conducted and presented Commercial Assessment for novel Early Stage Prostate Cancer Therapy, including determination of commercial strategy and sizing of \$1B+ market opportunity
- Screened 3500 asset database for \$100M public company to prioritize 33 most promising assets for deeper dive in regenerative medicine buy-side process

HEALTH ADVANCES

Analyst

Weston, MA
2012-2014

- Consulted on strategy for drug, device, diagnostics, and investment clients; quantified market opportunities, assessed competitive landscapes, and performed primary research, including identification and recruitment of Key Opinion Leader medical experts
- Member, BioPharmaceutical Business Development Committee; Pricing, Reimbursement, and Market Access Committee

MERCK & CO., INC.

Intern, Department of Medicinal Chemistry

West Point, PA
2011-2011

- Synthesized 33 high priority novel compounds for evaluation in Merck's drug discovery program

COLUMBIA UNIVERSITY

Research Assistant, Department of Chemistry

New York, NY
2011-2011

- Organic synthetic chemistry in the lab of Professor Jack Norton

ADDITIONAL INFORMATION

- **Interests:** FAA Certified Private Pilot; additional interests include squash, golf, guitar, snowboarding, and literature

ANGELINDA CHEN

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EDUCATION

THE WHARTON SCHOOL, UNIVERSITY OF PENNSYLVANIA

Philadelphia, PA

Master of Business Administration Candidate

2016-2018

- GMAT: 760; Awarded William E. Newcomb Fellowship (based on outstanding academic and professional accomplishments)
- Leadership: Health Care Conference – Sponsorship Team; Social Impact Fellow; Social Impact Club – Community Director
- Member: Health Care Club, Digital Health Club, Social Impact Club, Canada Club, Storytellers Club

QUEEN'S UNIVERSITY

Kingston, Canada

Bachelor of Commerce (First Class Honors); option in Psychology

2008-2012

- Awarded Dean's List with Distinction 2009-2012 (based on annual academic ranking, conferred to top 10% of class)
- Awarded Scotiabank/Queen's University Leadership Award (based on academic standing and proven leadership abilities)
- 1 of 3 students selected out of 300 to study abroad at HEC Paris in France
- Co-Chaired 12-member team of Queen's Non-Profit Gateway; increased program offerings by 25% and sponsorship by 300%+, resulting in 50% increase in student engagement in non-profit leadership positions

EXPERIENCE

ACCENTURE

Toronto, Canada

Strategy Consultant

2015-2016

Management Consulting Analyst

2013-2015

- Ranked as 1 of the top 2 Analyst in Canada (out of 45); promoted to post-MBA position at first point of eligibility
- Winner of Q2 2014 Client Value Creator (out of 60+) and 2014 "Above and Beyond Contributor" Analyst Award (out of 45)

Select Clients and Projects:

IFC (World Bank): Assessed economic and social impact of growing women's insurance coverage in Asia, Africa, South America

- Partnered with public, private stakeholders to conduct inaugural study on women's health, life, property insurance needs
- Led team of 3 to build quantitative models to estimate \$1.4 - \$1.7T market value of women's global insurance spending
- Recommended gender-disaggregated strategies for insurers to capture up to \$300B in global commercial opportunities
- Managed global team of 5, including non-native English speakers, to author "SheforShield" report; published in Sep 2015

Canadian Bank: Designed sales organization model to improve retail banking customer service

- Devised roles and responsibilities of 2500+ sales employees to increase customer satisfaction from 2M+ retail customers
- Collaborated with executives to coordinate 3-year implementation plan with \$100M+ digital service transformation

US Fortune 100 Insurer: Shaped strategies and processes to transition employees into new operating model

- Defined 3-year strategy for a \$250M+ program to transition 30,000+ claims employees from 200+ to 26 locations
- Constructed quantitative models to advise on cost effective transition strategies; established consensus amongst executives

Canadian Provincial Insurer: Refined customer relationship strategy to meet growth goals

- Recommended marketing and sales initiatives to reach cross-sell/up-sell goals of \$500M in revenues in 5 years
- Built strategic relationships with 12 departments to optimize staff allocation in delivering \$2M+ worth of projects

Canadian Person-with-Disabilities Non-Profit: Created marketing strategy to grow corporate membership revenue

- Analyzed competitive landscape and developed marketing strategy to grow corporate membership by 100% in 2 years
- Refined 3-year strategic plan to build agreement between Management and the Board of Directors

HEALTHCARE MATERIALS MANAGEMENT SERVICES

London, Canada

Hospital Logistics and Sourcing Student Intern

2010

- Assessed financial and personnel impact of implementing a \$1M+ digital communication system in 14 regional hospitals
- Developed and implemented 14+ key performance indicators to identify operational inefficiencies in capital purchasing, inventory fulfillment, accounts receivable, accounts payable processes; KPIs are still in use today

ADDITIONAL INFORMATION

- **Community Involvements:** Accenture – Led Onboarding and Training program for 25 new Canadian analysts across 3 offices; Community Seed Consulting – Managed team of 3 to develop internship program for start-up consultancy
- **Languages:** Mandarin (fluent); French (beginner)
- **Interests:** Long distance running (completed 2 half-marathons), swimming (former lifeguard), performing music (grade 10 piano, intermediate violin, beginner ukulele), traveling (25+ countries across 6 continents)

MATTHEW DELANEY

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EDUCATION

THE WHARTON SCHOOL, UNIVERSITY OF PENNSYLVANIA

Philadelphia, PA

Master of Business Administration Candidate; Major in Health Care Management

2016-2018

- On planning committee for biopharma-focused panel at the 2017 Wharton Health Care Business Conference
- Director of Member Education and Special Events for the General Management Club
- Club membership: Health Care, Digital Health, General Management, Public Speaking, Skiing, Outdoors, Acting

BOWDOIN COLLEGE

Brunswick, ME

Bachelor of Arts; Double Major in Economics and History

2007-2011

- 3.79/4.00 GPA
- Awarded A. Myrick Freeman Prize for exceptional performance in the Economics Major
- Selected as research assistant on an intergenerational health project, conducted data analysis for two years
- Worked full-time as research assistant to three professors, conducting research on credit spreads and recession impact

EXPERIENCE

L.E.K. CONSULTING

Boston, MA

Life Sciences Practice Specialist

2014-2016

Drove 5 major internal initiatives for 17 Managing Directors of the U.S. Life Sciences practice, resulting in improved business development and project performance to achieve >\$50M annual revenues. Select examples include:

- Developed strategy to capture important Life Sciences intellectual property from projects, managing 30+ staff as they developed 170+ topic primers, 60-100 slides each, on diverse topics from biosimilars to launch planning to specific diseases
- Coordinated internal capabilities assessment that led to a shift in L.E.K.'s work model towards more advanced data analytics
- Led training sessions and developed training material for junior staff to prepare them for Life Sciences casework
- Implemented a new recruiting initiative designed to increase quality of applicants within the Life Sciences practice
- Created five segment specific client outreach strategies, conducting detailed market research and coordinating workshops of 10+ Managing Directors and other staff; target industries included large pharmaceuticals, biotech, medical devices, diagnostics, and pharma services

Associate – Associate Consultant

2011-2014

Managed work streams, conducted research, and developed deliverables in 20+ projects for top companies in Life Sciences and beyond. Selected examples include:

- Pharma corporate valuation: Developed a detailed scenario-based corporate model for an emerging biopharma company; determined optimal 5-year corporate strategy to enable a strong pipeline beyond their first product launch
- Disease screen: Identified the five transplant-associated viruses with the greatest commercial opportunity as well as the optimal way to address unmet needs of each, on behalf of for a large pharmaceutical company looking to enter the space
- MedTech brand relaunch: Led four colleagues in investigation of commercial underperformance of micro-endoscope product; created a turnaround plan to improve sales by addressing physician awareness of the value proposition
- Royalty monetization: Directed research and interview workstreams for an anti-TNF therapy royalty valuation
- Diabetes care management: Led discussions with Chief Medical Officers at insurance companies to determine the feasibility of a proposed novel care management model; successfully convinced the client to alter their risky proposed approach
- Beyond casework, developed training material and taught an improved approach to drug probability-of-success modeling

Edgewood Capital Advisors

Southport, CT

Commercial Real Estate Summer Intern

2009

- Analyzed P&L statements across multiple properties and collaborated with property owners to devise and implement changes
- Performed due diligence on numerous commercial, industrial, and residential properties, including environmental report analysis, property valuation, and research on lease holders

ADDITIONAL INFORMATION

- **International**: Dual United States and European Union citizenship
- **Avid Outdoorsman**: Eagle Scout, trained trip leader (led camping trips for incoming college Freshmen three years in a row), skier, camper, canoer, and kayaker
- **Other Interests**: Make-a-Wish Foundation, ultimate frisbee player, reader of world history, and connoisseur of craft beer

NEHA A. GAVAI

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EDUCATION

THE WHARTON SCHOOL, UNIVERSITY OF PENNSYLVANIA

Philadelphia, PA

Master of Business Administration Candidate; Major in Health Care Administration

2016-2018

- Awarded Kaiser Fellowship for professional, academic, and personal achievement
- VP of Business Development for Digital Health Club; Member of Wharton Health Care Business Conference Marketing Team; Tour Guide for Student Admissions Program

CORNELL UNIVERSITY, COLLEGE OF ARTS AND SCIENCES

Ithaca, NY

Bachelor of Arts; Major in Biological Sciences (cum laude), Major in Economics

2008-2012

- National Merit Scholar; Howard Hughes Summer Research Scholar; Biology Honors Recipient in Microbiology and Immunology; Under-Secretary General of Committees for Cornell Model United Nations Conference

EXPERIENCE

STRATEGY& (FORMERLY BOOZ & COMPANY)

New York, NY

Senior Associate, Life Sciences Strategy

2015-2016

- **Digital Health Strategy at a Global Pharmaceutical Company**
 - Assessed digital health value drivers, “ways to play”, and strategic messaging across 20 pharmaceutical companies to inform company-wide digital health strategy
 - Created three innovative digital solutions to engage patients with diabetes, schizophrenia, and COPD; evaluated patient and provider willingness to use each solution
 - Forecasted a 240,000 annual increase in COPD prescriptions driven by implementation of proposed COPD digital solution; accordingly, presented recommendation to pursue COPD solution to Executive Director of Business Innovation
- **Oncology Patient Engagement Strategy at a Fortune 100 Pharmaceutical Company**
 - Classified four distinct patient segments to identify unfulfilled needs along the metastatic breast cancer patient journey
 - Designed four solutions to address prioritized needs for metastatic breast cancer patients and collaborated with customer experience team to craft solution prototypes for market testing
 - Prepared a three-year financial cost model for each solution and calculated a 0.2% year-over-year increase in existing patients required to breakeven with total solution costs

PWC ADVISORY SERVICES

New York, NY

Associate, Health Industries Advisory

2012-2014

- **Patient Engagement Strategy at a Global Pharmaceutical Company**
 - Led working session with five senior clients to evaluate potential initiatives to enhance patient experience
 - Conducted client patient engagement benchmark analysis against 21 pharmaceutical industry competitors
 - Developed four key strategies to guide development of a centralized patient engagement initiative
- **Price Management Strategy at a Major Medical Device Manufacturer**
 - Led over 10 client interviews to obtain understanding of current price management organizational structure
 - Recommended 23% decrease in number of sales operations employees to optimize enterprise performance
- **Product Life Cycle Management Strategy at a Global Pharmaceutical Company**
 - Collaborated with Chief Strategy Officer to prepare a key company messaging platform for Investor Day
 - Aggregated firm financial records to identify a scope of 10 payer accounts, collectively driving 66% of net sales and 84% of total utilization for flagship branded drug
 - Generated innovative pricing and contracting strategies targeted at 10 accounts to position flagship drug effectively after patent expiration
- **Production and Launch of PwC Health Research Institute “New Entrants” Thought Leadership Report**
 - Corresponded with 15 health industry CEOs to secure formal endorsement for a PwC Health Research Institute report
 - Constructed model to calculate \$267 billion annual U.S. ancillary health services revenue
 - Managed regulatory requirements and marketing efforts related to report launch

ADDITIONAL INFORMATION

- **Internships and Activities:** Bio-Analytical Sciences Intern at Bristol-Myers Squibb Company (2011), Diversity Lead for PwC Recruiting (2013-2015)
- **Interests:** Tennis, hiking, foreign films, hot sauce tastings

CHRISTINE GOLDRICK

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EDUCATION

THE WHARTON SCHOOL, UNIVERSITY OF PENNSYLVANIA

Philadelphia, PA
2015-2018

Master of Business Administration Candidate

- **Honors:** Anne M. Harding Endowed Fellowship for outstanding leadership and service, Wharton Social Impact Initiative Fellowship

HARVARD KENNEDY SCHOOL OF GOVERNMENT

Cambridge, MA
2015-2018

Master of Public Administration Candidate

- **Honors:** Harvard Kennedy School Presidential Scholarship, Alfred K. Priest Scholarship

DARTMOUTH COLLEGE

Hanover, NH
2007-2011

Bachelor of Arts; Major in Government, Minor in French

- **Honors:** GPA 3.7/4.0, *cum laude*, Departmental Honors, Recipient of the President's Milton Sims Kramer Prize for impact on Dartmouth community, Carl F. Schipper Fellowship for achievement in leadership

EXPERIENCE

ANALYSIS GROUP

Boston, MA

Summer Associate

June-August 2016

- Conducted econometric analysis to produce expert reports on regulatory issues for clients in litigation
 - Created statistical analysis plan and executed data analysis using Python, Stata, and Excel on the presence of housing discrimination due to gender identity in Boston
 - Researched university endowments, royalties, and other revenue streams for expert report on the microeconomics of tax exemption for university defendant in litigation
 - Synthesized results of quantitative studies for forthcoming meta-analysis on the effect of direct-to-physician marketing on physician prescribing behavior

CIGNA HEALTHCARE

Philadelphia, PA
May-June 2016

Value Based Reimbursement Summer Associate

- Supported strategic operations team of the health insurance company's fee-for-value business
 - Researched and produced presentation contrasting Medicare and Cigna's bundled payment models for senior executives. Developed recommendations to increase provider ability to bear financial risk
 - Created payment process maps for Cigna's new value-based programs. Identified operational solutions to reduce financial reporting turnaround times by 20 percent

CLINTON HEALTH ACCESS INITIATIVE

Mbabane, Swaziland
2014-2015

New Diagnostic Technologies Associate

- Advised senior officials of the Ministry of Health to improve efficiency of supply chain, financial management, and delivery systems; led in-country workstream to improve laboratory testing services.
 - Developed and costed six implementation plans for national scale-up of new HIV testing technology to inform Ministry selection of a \$6.5MM rollout strategy to reach 145,000 HIV patients by 2016, a 110-fold increase in tests
 - Forecasted annual demand for +800 laboratory reagents and consumables to maintain reliable supply of products for 2.2MM tests and ensure patient access to laboratory testing; built streamlined \$5MM laboratory budget
 - Created strategy to manage backlog of untested patient samples by optimizing laboratory equipment usage and available staff; implemented plan increased laboratory capacity to handle samples by 33%
 - Hired, trained and managed New Diagnostic Technologies Analyst

INNOVATIONS FOR POVERTY ACTION

Kampala, Uganda
2012-2014

Senior Project Associate

- Managed nationwide study evaluating the impact of programs that used SMS technology to report real time public service deficiencies to government officials
 - Led team of over 90 employees to survey 6,000 households and 200 politicians in 9 languages for the largest survey conducted by IPA in Uganda to date
 - Managed relationship with NGO partners, including conducting trainings on research methods and advising on program design; handled \$670,000 study budget and reporting to project's donor organizations
 - Developed and piloted seven quantitative survey instruments; wrote and analyzed data using Stata for three reports on preliminary research findings; conducted 30+ qualitative semi-structured interviews

ADDITIONAL INFORMATION

- **Skills:** Basic proficiency in SAS, Python, R, SQL. Intermediate proficiency in Stata and JMP. Advanced Microsoft Excel.
- **Interests:** Women's crew (Greenwich High School Varsity Rower 2004-2007), Korean cuisine, Hiking

ETHAN HARRISON HAIMM

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EDUCATION

THE WHARTON SCHOOL, UNIVERSITY OF PENNSYLVANIA

Master of Business Administration Candidate; Major in Health Care Management

Philadelphia, PA
2016-2018

- Member of Wharton Health Care and Digital Health Clubs

UNIVERSITY OF PENNSYLVANIA

Bachelor of Arts in Biological Basis of Behavior; Minor in Hispanic Studies

Philadelphia, PA
2007-2011

- *Summa cum laude*, Phi Beta Kappa
- Semester abroad in Buenos Aires, Argentina (Fall 2009)
- Undergraduate honors thesis studying mouse model for seizure susceptibility

EXPERIENCE

MANATT HEALTH (*Health Policy & Business Advisory Division of Manatt, Phelps & Phillips, LLP*) Manager (2016); Consultant (2014-2015)

New York, NY

- International Patient Growth Strategy for Leading Children's Hospital
 - Performed data analysis, research and stakeholder interviews to evaluate current state of client's international patient program; findings indicated strong historical performance, but lack of sufficient infrastructure and strategy to sustain future growth
 - Presented set of proposals to address identified challenges and support client in growing program revenue by 50% over five years; recommendations included revising organizational model, entering new target markets and implementing new patient care model to enhance patient experience
- Medicaid Delivery System Reform
 - Performed project management to guide client through competitive application process to receive \$127M from New York State to transform Medicaid care delivery
 - Facilitated multi-stakeholder workgroups charged with developing implementation plans for defined projects, including creating integrated delivery system, integrating primary care and behavioral health and transitioning to value-based payment
- Growth Strategy and Business Plan for Hospice Provider
 - Identified and evaluated three potential growth strategies to help client grow hospice program, ranging from incremental and organic growth to geographic expansion through acquisition
 - Facilitated discussions with leadership to understand implications of each strategy (e.g., growth opportunity, required investment, risks) and developed five-year pro forma and implementation plan for selected strategy

NEXERA (*Health Care Consulting Division of Greater New York Hospital Association*) Consultant (2013-2014); Analyst (2011-2012)

New York, NY

- Hospital Supply Chain Cost Reduction
 - Achieved over \$4M in supply chain savings for hospitals through various cost reduction strategies, including benchmarking, vendor consolidation, capitated pricing and vendor negotiation
 - Collaborated closely with physicians, nurses and hospital leadership to review financial performance data, evaluate cost reduction options and standardize use of high-cost medical devices

ADDITIONAL INFORMATION

- **Volunteering:** Penn Alumni Interview Program and Musicians On Call, an organization that brings the healing power of music to hospital patients
- **Languages:** Proficient in Spanish (reading and speaking)
- **Interests:** Discovering new music through blogs and concerts, learning about meteorology and storm tracking

NATHAN R. HANDLEY, MD

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EDUCATION

THE WHARTON SCHOOL, UNIVERSITY OF PENNSYLVANIA

Master of Business Administration Candidate; Major in Health Care Management

Philadelphia, PA
2016-2016

- Honors: Recipient of Kaiser Fellowship for exceptional professional, academic, and personal achievement
- Active in: Health Care Club, Digital Health Club

UNIVERSITY OF MINNESOTA MEDICAL SCHOOL

Doctor of Medicine

Minneapolis, MN
2008-2012

- Honors: Alpha Omega Alpha, Gold Humanism Honor Society, Medical Student Achievement Award, Variety Endowed Scholarship, Dr. Neal Gault International Study Award, Minnesota Medical Foundation Scholarship
- Active in: medical school peer review committee, student-run Phillips Neighborhood Clinic, global health (Ilula District Hospital in rural Tanzania), head and neck oncology research (two national presentations)

BIRMINGHAM-SOUTHERN COLLEGE

Bachelor of Science in Chemistry, Bachelor of Arts in Philosophy, Summa cum laude

Birmingham, AL
2004-2008

- Honors: Phi Beta Kappa, Philosophy Departmental Award, Dean's List
- Active in: peer review committee, organic and biological chemistry research

EXPERIENCE

UNIVERSITY OF PENNSYLVANIA

Fellow Physician, Division of Hematology-Oncology, Department of Medicine

Philadelphia, PA
2015-Present

- Leading team in development of PennTrials, a novel clinical trial management platform designed to improve access to and knowledge of clinical trials for clinicians at Penn Medicine
- Serving in Low Risk Prostate Cancer Pathway Committee, part of a clinical pathway program to foster consistent practice of high value care across Penn Medicine by creating evidence-based treatment algorithms
- Providing outpatient care and inpatient consultative services in solid oncology, liquid oncology, and benign hematology at the Abramson Cancer Center, the Hospital of the University of Pennsylvania and the Philadelphia Veterans Affairs Hospital
- Staffing weekend and holiday advice line for hematology and oncology patients treated at Penn Medicine

STROLL HEALTH

Advisor

San Francisco, CA
2013-2015

- Advised Stroll, digital health startup seeking to provide price transparency data to physicians and patients, by delivering physician perspectives, analyzing medical literature, and facilitating clinical workflow navigation

UNIVERSITY OF CALIFORNIA SAN FRANCISCO

Intern and Resident Physician, Department of Medicine

San Francisco, CA
2012-2015

- Engaged in the Health Systems and Leadership Pathway, a program designed to provide resident physicians with the knowledge, skills, and mentorship necessary to prepare for leadership careers in healthcare systems. Delivered series of presentations at departmental and national meetings; published peer-reviewed article on redesigning specialty care access
- Led teams of three to five residents, interns, and medical students; oversaw and coordinated clinical care and taught core medical knowledge on inpatient services at the San Francisco Veterans Affairs Hospital, San Francisco General Hospital, and UCSF Medical Center
- Provided outpatient continuity care for a panel of 120 patients at UCSF's General Internal Medicine Clinic
- Represented resident physicians on the Veterans Affairs Interprofessional Team Development Committee, established to improve interdisciplinary training for physicians in patient-centered teams by re-examining the structure of medicine rounds
- Produced novel melanoma immunotherapy research in inter-institutional collaboration with oncology and dermatology divisions at UCSF and UCLA. Work was presented at a national cancer research meeting
- Authored chapter in the University's clinical handbook; published peer-reviewed article on antibiotic overuse

ADDITIONAL INFORMATION

- **Certifications:** Board Certified in Internal Medicine; current license to practice in Pennsylvania; prior licensing in California
- **Interests:** travel, photography, cooking, meditation, family

DHRUV JAGGIA

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EDUCATION

THE WHARTON SCHOOL, UNIVERSITY OF PENNSYLVANIA **Philadelphia, PA**
Master of Business Administration Candidate; Major in Healthcare Management and Finance **2016 - 2018**

- **Leadership:** Student Life Chair, Cluster Council; Teaching Assistant, Life Sciences Management Program 121
- **Involvement:** HealthCare Club, Digital Health Club, Technology Club, Finance Club, PE/VC Club
- **Other Test Scores:** MCAT – 36 R (94 percentile)

EMORY UNIVERSITY **Atlanta, GA**
Bachelor of Science in Neuroscience and Behavioral Biology, Bachelor of Arts in Chemistry **2006 - 2010**

- President, Mortar Board Honor Society; Senior Legislator, College Council; Co-Captain, Karma Dance Team
- Managed 11 sales representatives and achieved \$450,000 in revenue as Business Manager for The Emory Wheel Newspaper
- Volunteered as a certified Emergency Medical Technician, responding to over 100 emergency calls over two years

EXPERIENCE

EVERSTONE CAPITAL MANAGEMENT **Mumbai, India**
Private Equity Summer Intern **Summer 2016**

- Developed an equity valuation model through analysis of comparable public companies and building a pro forma financial model for a successful \$150M USD investment in a mature player in nutraceutical industry
- Conducted industry due diligence to develop two points of views on commercial paints and hospital industries in India

INTERNATIONAL BUSINESS MACHINES (IBM) CORPORATION **New York, NY**
Strategic Partnerships, IBM Watson Ecosystem **2015 - 2016**
Partner Engagement Manager, IBM Watson Ecosystem **2012 - 2015**

- Launched and scaled the Watson Ecosystem to over 500 partners by designing an aggressive sales and marketing strategy
- Spearheaded commercialization of partners' cognitive applications through project & product management, sales, marketing, communications, financial modeling, and contracts expertise; ultimately achieving 150% of contract quotas
- Led the Ecosystem's first expansion into Europe by hiring and training a local team and exceeding success criteria by 22% in first year of operations
- Mentored and trained 60% of all new hires, including business development and sales representatives, software architects, and designers, over first 18 months of Ecosystem growth
- Performed technical and product due diligence with a team of engineers and software architects for IBM Watson's \$100M seed fund, resulting in four investments totaling \$7M in healthcare, retail, and travel industries
- Presented at major industry conferences such as Prime Health Denver, The Colorado Innovation Summit, IBM PartnerWorld, IBM Insight, and IBM Connect
- Captained winning team at IBM's Blue Spark Executive Challenge by creating an innovative HR solution using Watson
- Rated amongst top 2% of performers four years in a row (2012-2015); IBM 100% Club & Sales Eminence Award (Jan 2015); IBM Managers Choice Award (Jun 2014, Dec 2014, Jun 2015)

TEACH FOR AMERICA (TFA) – MIAMI DADE PUBLIC SCHOOLS **Miami, FL**
AP and Honors Biology Teacher – Miami Northwestern (MNW) Senior High School **2010 - 2012**

- Drove data-driven instruction at MNW by creating innovative tools for more effective differentiated lesson plans resulting in a 500% increase in AP Biology pass rates and 58% increase in Honors Biology pass rates over two years
- Awarded a \$50,000 grant from The Knight Foundation to restructure a classroom through use of netbooks, online resources, and digital collaboration to better prepare students for a modern college experience
- Supervised Junior Development Committee to execute second year giving campaign, raising over \$20,000
- Chaired TFA Corps Advisory Team focused on improving corps culture for 300 teachers
- Awards: Rookie Teacher of the Year – MNW (Jun 2011) and Claes Nobel Educator of Distinction (Jun 2011)

ADDITIONAL INFORMATION

- **Interests:** Bhangra dancer, Travel (Grew up in India, Singapore and USA; Visited 20+ countries), Avid reader (Biographies, Historical Fiction, and Mysteries), Cooking, Sports (Tennis, Cricket, Football, and Wharton Hockey)
- **Languages:** Hindi – native, Spanish – conversational
- **Citizenship/Residency:** USA, India

KISHORE L. JAYAKUMAR

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EDUCATION

THE WHARTON SCHOOL, UNIVERSITY OF PENNSYLVANIA **Philadelphia, PA**
Master of Business Administration Candidate; Major in Health Care Management **2016-2018**

- Active in Health Care, Digital Health Care, Consulting, Human Capital, and Volleyball Clubs
- GMAT: 760 | Kaiser Fellowship recipient, Boston Consulting Group (BCG) Fellow, McKinsey Emerging Scholars finalist

PERELMAN SCHOOL OF MEDICINE, UNIVERSITY OF PENNSYLVANIA **Philadelphia, PA**
Doctor of Medicine Candidate **2013-2018**

- Co-President/Delegate, American Medical Association; Clinical Volunteer, United Community Clinic; Near Peer Mentor, Department of Medicine; Student Interviewer, Admissions Program
- Authored dermatology chapter for *Gunner Goggles Pediatrics* (Elsevier) clerkship review book
- Published *Academic Medicine* editorial on the role of numerical USMLE Step 1 scores in residency applicant selection
- Studied effect of preclinical exam scheduling on medical student burnout; published results in *MedEdPublish*

CARNEGIE MELLON UNIVERSITY **Pittsburgh, PA**
Bachelor of Science; Major in Biological Sciences and Psychology, Minor in Business Administration **2009-2012**

- Cumulative GPA: 3.90/4.00 | University Honors, Phi Beta Kappa, Phi Kappa Phi, and Dean's List with High Honors
- Resident Assistant, First-Year and Upperclassman Residences; Research Assistant, Social Psychology Lab; Volunteer, University of Pittsburgh Medical Center HELP program; Volunteer, Global Medical Brigades

EXPERIENCE

MEDICAL STUDENT FINANCIAL LITERACY STUDY **Philadelphia, PA**
Investigator **2014-2015**

- Designed 35-item survey using FINRA and Vanguard instruments to assess financial literacy among U.S. medical students; contacted and collaborated with representatives at seven medical schools to administer survey to 2,800 students
- Managed team to develop and execute grounded theory-based coding protocol for qualitative responses, leading to high inter-rater reliability; analyzed quantitative results using logistic and linear regression techniques in Stata
- Revealed low financial literacy and inadequacy of current curricula in preparing medical students to manage personal finances; presented findings at American Medical Association Research Symposium

UNIVERSITY OF PENNSYLVANIA HEALTH SYSTEM **Philadelphia, PA**
Center for Evidence-Based Practice Research Fellow **2014**

- Evaluated impact of Penn's hospital evidence-based practice center by analyzing internal database of evidence reviews and surveying health system clinical and administrative leaders
- Demonstrated potential of evidence-based practice centers to disseminate rapid and concise evidence syntheses and to improve both clinical and administrative decision making; published findings in *Journal of Hospital Medicine*

PITTSBURGH PREP **Pittsburgh, PA**
SAT/Math/Biology Instructor **2010-2012**

- Implemented computerized exam scoring, eliminating grading errors and expediting turnaround time by 3 days
- Authored SAT Math Level 2 course book and standardized curriculum for all instructors
- Designed and actualized formal Math Level 2 training program for all instructors, boosting teacher confidence and expertise

ADDITIONAL INFORMATION

- **Certifications:** Enrolled Agent, Internal Revenue Service; Series 65 and 63 licenses (inactive), FINRA; Accredited Asset Management Specialist, College for Financial Planning
- **Digital Skills:** Stata, SPSS
- **Languages:** French (intermediate)
- **Interests:** Cycling, volleyball, tennis, swimming, aviation, history, personal investing, tutoring

PANKAJ JETHWANI, MD

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EDUCATION

THE WHARTON SCHOOL, UNIVERSITY OF PENNSYLVANIA Philadelphia, PA
Master of Business Administration Candidate; Majors in Healthcare Management & Business Analytics 2016-2018

- Recipient of Kaiser Family Foundation Scholarship for outstanding professional and academic accomplishments
- Member of Wharton's Health Care Club, Digital Health Club, PBG Healthcare Consulting, and Technology Club

DR. V. M. MEDICAL COLLEGE, MAHARASHTRA UNIVERSITY OF HEALTH SCIENCES Solapur, India
Bachelor of Medicine and Bachelor of Surgery (MBBS – equivalent to an MD in the US) 2007-2012

- Co-founder, Vision 6 by 6 (affordable primary eye-care non-profit) – managed 10000+ beneficiaries at \$2 per patient
- Intern, Center for Connected Health (Partners Healthcare) – assessed cost savings and therapeutic benefits for an online second opinion program

EXPERIENCE

THE BOSTON CONSULTING GROUP New Delhi, India
Project Consultant – Public Sector Practice 2014-2016

- Developed strategic plan for the Rajasthan Government to improve quality, accessibility and affordability of primary health.
 - Created primary healthcare improvement plan to address issues of human capital, access and availability of supplies, with the goal of improving service levels at 2,100 primary health centers targeting 70Mn citizens.
 - Launched Program Management Office (PMO) within the Health Department. Plan currently being implemented by the PMO and BCG, directly impacting 120,000 department employees
 - Early impact includes improvement in facility utilization (40%), physician productivity (20%) & drug availability (20%)
- Developed plan to raise \$4Mn for UN agency in India to expand malnutrition program from 4Mn to 16Mn households.
 - Created sustainability plan to leverage corporate social responsibility of Indian companies; defined legal processes to address regulatory challenges.
- Assessed remedial education program delivered in 280 public schools; recommended improvements in training, curriculum, and structure of the program.
 - Recommendations were incorporated by the government; revised program rolled-out to 3,000 schools, 20,000 teachers, and 650,000 students; expected results include improving learning levels of children by 40% in 3 years.

THE BREAKFAST REVOLUTION, a social enterprise addressing malnutrition in Asia Mumbai, India
Board Member 2016-current
Founder and Partnerships Director 2014-2016

- Conceptualized and created enterprise to manufacture and distribute 7 Indian-FDA approved fortified food products.
- Executed scale up by partnering with 3 hospital chains, 40 non-profits, & 1 government agency; distributed 3 million meals to 30,000 low-income women and children in India and Nepal, reducing malnutrition in 70% beneficiaries in 6 months.
- Led growth of TBR to gross \$500,000 in revenue and purchase orders, and \$75,000 in grants within 2 years.

SAMHITA SOCIAL VENTURES, a development-sector focused boutique consulting firm Mumbai, India
Assistant Manager, Innovation and New Business 2013-2014

- Created corporate social responsibility strategy for pharmaceutical company to address cataracts. Plan leveraged unutilized capacity in eye hospitals as well as company's products to provide affordable surgeries to 100,000 patients/year.
- Created primary care program for mid-sized Indian pharmaceutical company to serve communities around its manufacturing plants. Program provides high quality, affordable care to 40,000 tribal inhabitants via a network of primary health clinics.

SIR J.J. GROUP OF HOSPITALS Mumbai, India
Medical Internship 2012-2013

- Practiced as primary care physician at leading tertiary-care hospital. Led care delivery at affiliate rural primary health center.

ADDITIONAL INFORMATION

Grants and Awards:

- **TBR:** D-Prize (\$20,000 grant, 2015); Rotary International's South Asia Outstanding Project Award (2015)
- **Vision 6 by 6:** Rotary International's Rotaract Outstanding Project Award (2013; 1st among 9500 non-profits)
- **Maid in India:** Pearson Fellow for Social Innovation (\$5,000 grant, 2011); UnLtd India Investee (\$8,000 grant, 2012)
- Select personal and organization grants: Share & Care Foundation (USA), Asha Vijay Foundation (USA), TakingITGlobal (Canada), YMCA (India), and Vitamin Angels (India)

Other Affiliations:

- Founder: Decimal Advisors, a consulting firm for foundations engaged in public health. Clients include WISH Foundation (USA) and Private Provider Interface Agency (PPIA) of PATH (India).
- President (2012) of RC Caduceus (emergency care non-profit of 300+ doctors from 6 medical colleges in India).

ALEXANDER CHASE JONES

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EDUCATION

THE WHARTON SCHOOL, UNIVERSITY OF PENNSYLVANIA

Master of Business Administration Candidate; Majors in Health Care Management, Strategic Management

Philadelphia, PA
2016-2018

- Elected Cluster 3 President by fellow classmates, overseeing leadership of 210 students
- Member of the 2017 Welcome Committee; selected from 200 applicants by the Dean of Students
- Member of Wharton's Consulting Club, Health Care Club, Social Impact Club, Politics & Public Policy Club, Hockey Club

UNIVERSITY OF NORTH CAROLINA, KENAN-FLAGLER BUSINESS SCHOOL

Bachelor of Science in Business Administration; Minor in Exercise and Sports Science -- Coaching

Chapel Hill, NC
2006-2011

- Graduated with Distinction, Eve Marie Carson Memorial Scholar
- Varsity Baseball Team Captain, ACC Scholar-Athlete

EXPERIENCE

VS. CANCER FOUNDATION

Founder + CEO

Raleigh, NC
2012-2016

- Established Vs. Cancer Foundation as viable and sustainable childhood cancer non-profit organization by managing hundreds of events nationwide to raise over **\$3.2MM in 3.5 years**, and generated annual revenue of **\$1MM** by third year of existence
- Fostered relationships for fundraising with over **150** universities, colleges, high school, youth and professional teams
- Oversaw creation and management of annual budget, maintaining **less than 15%** expense ratio annually
- Initiated relationships for funding within **94** children's hospitals in US to benefit **40,663** children with cancer
- Instituted multiple patient experience-enhancing, stress-reduction programs within hospitals, including the creation of a teen-focused adolescent and young adult specific healing room in the Children's Hospital of Philadelphia
- Collaborated with 13 separate cancer research institutions, providing over **\$1.2MM** in research grants
- Led all external recruitment and hiring efforts, growing and managing staff of **four employees**
- Executed successful merge of Vs. Cancer with the Pediatric Brain Tumor Foundation, negotiating full-staff retainment, increase of employee benefits, brand preservation, and national board seat position

ST. BALDRICK'S FOUNDATION

BaseBald and Family Relations Coordinator

Raleigh, NC
2011-2012

- Founded BaseBald program, funding childhood cancer research through networking with baseball-specific athletes
- Developed internal business plan, social media initiatives, external marketing plan to generate over **\$389,000** in 11 months
- Managed advocacy of NC legislation, leading to **successful passing of 'Creating Hope Act'** in 2012, providing market incentives for pharmaceutical companies in developing drugs for children with rare diseases
- Engineered 'Adolescent and Young Adult Task Force' connecting current cancer survivors to local initiatives within hospitals and respective communities for post-treatment aid and networking

LIVESTRONG

Grassroots Fundraising Intern

Austin, TX
Summer, 2011

- Orchestrated national fundraising efforts for LIVESTRONG on grassroots and singular fundraising level raising over **\$350,000** for cancer survivorship
- Oversaw all aspects of event planning by facilitating relations with direct Partnered Events, totaling 6 national LIVESTRONG events to raise **\$4.2MM**

ADDITIONAL INFORMATION

- **Interests:** Public speaking, fitness, personal and professional travel across United States, personal productivity reading, non-profit leadership enhancement, Salesforce, and avid college sports fan
- **Positions:** Board Member of North Carolina Advisory Committee on Cancer Coordination and Control and Pediatric Brain Tumor Foundation, Advisory Council to Pediatric Oncology Clinic at UNC Lineberger Comprehensive Cancer Center

ALEX KAIN

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EDUCATION

UNIVERSITY OF PENNSYLVANIA – WHARTON SCHOOL OF BUSINESS

PHILADELPHIA, PA

Master of Business Administration, major in Healthcare Management

2016 – 2018

- Clubs: Wildmen Hockey Board (Operations) & Team Captain, Healthcare, Digital Health, Public Speaking, Ski & Snowboard, Tennis, PE/VC, Yoga & Wellness, Storytellers, Dealmakers, MBA Pub, and Adam Smith Society

INDIANA UNIVERSITY – KELLEY SCHOOL OF BUSINESS

BLOOMINGTON, IN

Bachelor of Science in Business, with honors and distinction, major in Finance

2008 – 2012

- GPA: 3.7/4.0
- Key Activities: I-Banking Workshop, Business Honors Program, Sigma Alpha Mu Fraternity (2x Rush Chair), Dance Marathon

PROFESSIONAL EXPERIENCE

CRESSEY & COMPANY LP

CHICAGO, IL

Private Equity Associate

2014 – 2016

- Member of investment team for healthcare services focused private equity firm with over \$1B under management
- Primary sector coverage: senior care, outpatient physical therapy, dentistry, veterinary drug compounding

Investment Screening

- Conducted macro research on healthcare sector to determine firm-wide focus areas for investment consideration
- Defined key value drivers and characteristics of attractive platform in targeted sectors
- Managed business development efforts by prospecting, targeting, and networking with business operators and owners
- Initiated process to maintain continuous deal flow, which led to largest number of dollars and deals invested in firm's history

Deal Evaluation & Execution

- Crafted investment theses, highlighting merits and risks, and presented recommendations to investment committee
- Met with management teams and observed core operations to determine quality and scalability of key business functions
- Analyzed target's business trends and KPI's to create financial models that illustrated rates of returns for investors
- Coordinated and managed teams of advisors to conduct operational and financial diligence during new deal preparation
- Negotiated key leverage terms with lenders, and legal and diligence items with sellers

Portfolio Management

- Worked with portfolio executives on growth strategies, operational development, capital raising, and budgeting
- Completed sale of two portfolio companies (Encompass Home Health - \$750M / Hospice Compassus - \$315M)

LAZARD

NEW YORK, NY

Investment Banking Analyst (Telecom, Media, and Technology Group)

2012 – 2014

- Advised Fortune 500 publicly-traded and privately-owned clients on range of strategic transactions
- Completed four M&A deals in two years, including both buy-side and sell-side engagements
- Performed extensive valuation and financial analysis, and managed deal processes on behalf of clients
- Drafted offering memorandums and management presentations in preparation for sell-side assignments

ADDITIONAL INFORMATION

COMMUNITY ENGAGEMENT

- Indiana University MBA Workshop – Co-Chair 2016 – Present
- Tennis Opportunity Program (TOP) – Founder & Chair of Fundraising Board 2015 – 2016
- One Million Degrees – Peer Mentor 2014 – 2015
- Project HAPPY – Volunteer 2013 – 2014

INTERESTS

- Health and wellness, personal investing, skiing, golf, global travel, biographies, NY sports teams

INNA KARYEVA

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EDUCATION

THE WHARTON SCHOOL, UNIVERSITY OF PENNSYLVANIA

Philadelphia, PA

Master of Business Administration Candidate; Major in Healthcare Management

2016-2018

- Operations Committee Member, Healthcare Conference Club; Member of Healthcare Club; Mentor, GUIDE Program; Board Member, Wildmen Hockey; Russia and FSU Club, Out for Business, Wharton Graduate Association, Ski and Snowboard Club

CARNEGIE MELLON UNIVERSITY

Pittsburgh, PA

Bachelor of Science in Business Administration, Minor in Global Systems and Management

2008-2012

- Member, Conference Committee Leader, Undergraduate Marketing Organization: Organized speaker series of 10 events per year with 50-75 people at each. Co-led a committee of 7 students to host annual conference with 150-200 attendees.
- Planning Committee, 1000+, a campus-based service org: Directed logistics for 2,500 student volunteers.

EXPERIENCE

EVOLENT HEALTH

Arlington, VA

Associate Director, Health Plan Product Development

2015-2016

Engagement Manager, Payer Strategy and Operations

2014-2015

Associate Program Manager, Payer Strategy and Operations

2012-2014

- Led cross-functional team of 12, from Pharmacy, Clinical Operations, Service Operations, Quality, Compliance, and IT departments, to manage financial on ongoing operations for health plan products.
- Designed, developed and maintained organization's first health insurance exchange platform, utilized by over 5,000 users in 2015.
- Analyzed provider and hospital fee schedule pricing across markets and collaborated with provider network team to design new negotiation strategy. This new pricing strategy was the basis for lowering health insurance premium prices for consumers and organization projected membership growth of 120% by Jan 2016.
- Collaborated with corporate development department to develop business case for new growth in Managed Medicaid; evaluated risk and revenue opportunities and prioritized platform development requirements based on potential client needs.
- Developed plan to utilize external health plan administration services including an acquisition, a partnership, or building capabilities internally. Provided recommendation to partner with a Third Party Administrator services company which saved Evolent \$15M over 2 years.
- Implemented a new and innovative broker credentialing process. Credentialed 800+ brokers in 2 months, which was 2x faster than the old system.
- Managed applications for licensure with state governments and Center for Medicare and Medicaid, call center set-up, plan benefit design and build, regulatory submissions and marketing materials for multiple Medicare Advantage product launches.

ADDITIONAL INFORMATION

- **Interests:** Trying new restaurants (24 out of 25 target restaurants in DC), Ran three marathons in four years, art and exploring museums
- **Positions:** Deputy Project Leader, Compass -Led team of 8 individuals, developed strategic marketing plan for local non-profit that increased the organization's volunteer base by 75%; Developed website for Healthy Babies Project, Inc.; Founding Member and Mentor, Women at Evolent
- **Languages:** Native speaker of Russian and Ukrainian. Conversational in French

DAVID J. LI

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EDUCATION

THE WHARTON SCHOOL, UNIVERSITY OF PENNSYLVANIA

Master of Business Administration Candidate

Philadelphia, PA
2016-2018

- Affiliations: Wharton Technology Club, Entrepreneurship Club, Digital Health Club

WALTER A. HAAS SCHOOL OF BUSINESS, UNIVERSITY OF CALIFORNIA, BERKELEY

Bachelor of Science in Business Administration

Berkeley, CA
2008-2012

- Affiliations: Undergraduate Finance Association, Haas Business School Association
- Awards: Rothstein Kass Hedge Fund Case Competition Spring 2010 – 1st Place
Merrill Lynch, Pierce, Fenner & Smith Exemplary Performance Award 2009

EXPERIENCE

LONGITUDE CAPITAL

Senior Venture Capital Analyst

Menlo Park, CA
2014-2016

- Evaluated, executed and monitored investments for \$1.2bn venture capital fund focused on the healthcare technology sector
- Prepared and presented in-depth investment proposals, including detailed analysis on product profile, market dynamics, intellectual property and regulatory pathways, for Investment Committee consisting of all 10 investment professionals
- Conducted on-site due diligence alongside company management, Longitude advisors and key opinion leaders to evaluate companies' critical technologies, product development plans and financial profile
- Worked alongside management teams of various portfolio companies to develop and implement key strategic initiatives
- Performed financial analysis on term sheet structures to optimize capitalization structure and inform investment decisions

Selected Investment and Portfolio Experience:

- **BAROnova's \$36.5mm Series D equity financing (completed)**
 - Developed internal financial projections and product development timelines alongside CEO and VP, R&D
 - Actively engaged in quarterly Board of Director discussions regarding corporate and development strategies
- **Oculeve's \$25.0mm Series C equity financing (terminated due to acquisition)**
 - Spearheaded critical diligence efforts to evaluate regulatory and development pathway, engaging with industry leaders, Oculeve management team and Longitude advisors
 - Negotiated term sheet structure alongside Partner prior to deal termination due to \$200mm+ acquisition by Allergan

LAZARD FRERES & CO.

Investment Banking Analyst – Mergers & Acquisitions

San Francisco, CA
2012-2014

- Performed financial and strategic analyses on a wide range of companies from multi-billion-dollar hospital equipment manufacturers to venture-backed startups, utilizing LBO's, accretion/dilution's, DCF's and comparables analyses
- Worked with management teams to conduct detailed diligence in developing dynamic operating models
- Ranked as a top performer of Lazard's 2012 Analyst Class (consisting of over 55 analysts worldwide) for 2 years

OPEN WATER CAPITAL

Search Fund Associate Intern

Menlo Park, CA
2011-2012

- Worked alongside Founding Partners to identify attractive opportunities in various technology-enabled services sectors
- Created dynamic database to identify and evaluate attractive opportunities in the healthcare and education services sectors

ADDITIONAL INFORMATION

- **Interests:** Automobile enthusiast, avid guitar player, aspiring globetrotter, San Diego Chargers fan
- **Languages:** Conversational fluency in Mandarin Chinese and basic proficiency in Spanish
- **Community:** American Cancer Society - San Francisco Volunteer Council Member and Road to Recovery Coordinator
- **Technical:** FactSet, Capital IQ, ThomsonOne, PitchBook and Adobe Photoshop

NATHAN LIPKIN

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EDUCATION

THE WHARTON SCHOOL, UNIVERSITY OF PENNSYLVANIA **Philadelphia, PA**
Master of Business Administration Candidate; Major in Health Care Management **2016-2018**

- Member of Wharton's Healthcare Club, Digital Health Club, Entrepreneurship Club, Private Equity & Venture Capital Club
- GMAT: 750 (98th Percentile)

NORTHWESTERN UNIVERSITY **Evanston, IL**
Bachelor of Science in Journalism, Major in Economics **2008-2012**

- Led the sports section for *North by Northwestern*, a national award-winning student publication, and more than doubled the number of writers on staff through promotion of the program and mentoring of existing writers
- Strengthened local businesses through projects with Students Consulting for Non-Profit Organizations, including the creation of a marketing strategy for a computer literacy center and customer segmentation analysis for a mental health center

EXPERIENCE

GI PARTNERS **San Francisco, CA**
Private Equity Investment Associate **2014-2016**

- Developed investment theses and presented potential transactions to the Investment Committee, leading to four closed deals, and conducted business due diligence by identifying and constructing analyses to prove theses; selected projects include:
- **\$1.25 billion investment in Netsmart Technologies and Allscripts' Home Care segment (2016):**
 - Created detailed analyses to evaluate customer-level pricing and volume trends in conjunction with the home care and behavioral health technology markets to identify white space within the current customer base and industry
 - Managed third parties to support structure of the Transitional Services Agreement for the Allscripts carve-out
- **Cross-border investment in Logibec, a Canadian healthcare software company (2015):**
 - Conducted detailed potential customer and competitive landscape analyses to evaluate client retention trends and the potential to expand the company's presence in other provinces
 - Implemented new M&A strategy with the Chief Strategy Officer by creating a process for evaluating new opportunities, identifying potential targets and creating a management system to track discussions with executives
- **Investment in a manager of Skilled Nursing Facilities (2015):**
 - Compared the returns for acquiring a facility (owned or leased) against constructing a new facility with the CFO, leading to the recommendation to pursue a new build initiative in addition to the existing tuck-in acquisition strategy
 - Managed the transition from the previous CFO to replacement by taking a leadership role within the existing team and ensuring consistency, as well as guiding the new leadership by suggesting new process improvements

JEFFERIES LLC **New York, NY**
Investment Banking Analyst, Mergers & Acquisitions Group **2012-2014**

- Built financial models to evaluate and support potential transaction structures and frame recommendations, leading to more than ten closed deals on both the buy-side and sell-side; selected projects include:
- **Sale of Athletico Physical Therapy to Harvest Partners (2014):**
 - Created bottoms-up facility-level operating model for more than 75 facilities and conducted new build analysis to identify typical life cycle and returns for a new facility; aided the strategy team in evaluating new market facility builds
- **Public to public acquisition of Met-Pro Corporation by CECO Environmental Corp. for \$210 million (2013):**
 - Evaluated the impact of synergies and transaction structures on shareholder value, pro forma ownership and leverage, supporting the recommendation to shift from a merger of equals approach to a fixed price collar acquisition

ADDITIONAL INFORMATION

- **Interests:** International travel (Asia, South America), new musical instruments (saxophone), Boston athletics, reading historical nonfiction and long-form journalism, wine, wellness
- **Positions:** Member of Finance Committee for Alternative Family Services, a provider of foster care services for youth (2 years); member of Advisory Board for GLOW Foundation, fostering financial literacy for disadvantaged students (1 year)
- **Technical Coding:** Python, SQL
- **Languages:** Conversational in Russian and Spanish

MICHAEL C. LYTLÉ

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EDUCATION

THE WHARTON SCHOOL, PENN DESIGN, AND PENN ENGINEERING

Philadelphia, PA

Master of Business Administration Candidate, Major in Innovation Management (2017)

2015-2018

Master of Integrated Product Design Candidate (2018)

- **Club Leadership:** President, Innovation & Design Club; Director of Analytics & Business Development, Digital Health Club
- **Club Membership:** Analytics; Entrepreneurship; Health Care; Out for Business; Roadrunners & Triathletes; Technology

RICE UNIVERSITY

Houston, TX

Bachelor of Arts in Economics and Mathematics

2007-2011

- **Leadership:** Co-Founder, Rice Consulting Club; Chair, Rice Environmental Committee; Captain, Rice Club Volleyball
- Selected as one of 300 students into competitive General Course Program at London School of Economics; First Class Honors (top 6%) in managerial economics, information technology, and logic

EXPERIENCE

WELLSHEET (*early-stage health care technology company*)

New York, NY

Chief Product Officer, Co-Founder

2015-Present

- Conducted user interviews with 20+ providers and patients and designed high-fidelity wireframes for a software product
- Led team of nine engineers to create a minimum viable product that resulted in an invitation to demo for NYDHA
- Co-developed product video and business plan, selected by ONC as a top innovation for improving provider experience

SMART DESIGN

New York, NY

Strategist

2016

- Co-led design sprint on finances with millennial couples and developed 32 unique physical and digital solutions
- Presented implications of personal loan competitors to Director of Product Management at a top ten U.S. financial institution
- Conducted user interaction research on premium credit card benefits and presented to a top five credit card issuer

SENSE HEALTH (*series A health care technology company*)

New York, NY

Mobile Health Outcomes Expert

2015

- Designed digital marketing strategy and product roadmap to increase penetration by 20% among five key customer segments
- Launched 25+ email, Facebook, and LinkedIn campaigns with customized content, resulting in 40% increase in open rates
- Composed white paper and six case studies on features, chronic conditions, and customers, shared with 1,000+ users

DELOITTE CONSULTING LLP

New York, NY

Strategy and Operations Consultant / Strategy and Operations Business Analyst

2011-2015

Strategy Office of the CEO – Digital Strategy

- Directed analysis of Deloitte Digital's current position and advised CEO on opportunities for growth of over \$1.5B
- Led digital marketing study of over 150 competitors (e.g., ad agencies, software developers), acquisitions, and products
- Performed market research on Deloitte's software partners and recommended strategy for \$300M increase in revenue

Global Business Travel Divestiture – Consumer Products

- Managed transition services for the procurement function and coordinated with a group of 40+ stakeholders
- Devised and implemented solution for 1,000+ contracts in over 10 systems and 30 markets
- Designed pricing model and tracking mechanism that resulted in an estimated 40% increase in revenue

Select internal leadership positions include:

- Co-Founder and Lead, Consumer Products Mini-Hub: Worked with Consumer Products Consulting leader to establish distinct office cultures and improve accessibility to senior leadership, leading two teams of 15+ junior staff and senior leaders
- Co-Founder and Lead, Tri-State Pricing Community: Developed set of local initiatives to increase practitioner engagement in Pricing and launched hands-on training, resulting in 11 practitioners being deemed project-ready by Pricing leadership

ADDITIONAL INFORMATION

- **Endurance Athlete:** Ran five marathons (top 9%), 21 half marathons (top 5%), and 200-mile relay (ultra team); completed half ironman (70.3 miles); finished Tough Mudder Colorado (11 miles of obstacles and 3,500 feet elevation change)
- **Interests:** Human-centered design, consumer psychology, quantified self movement, wearable technology, matcha

CLIFFORD M. MARKS

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EDUCATION

THE WHARTON SCHOOL, UNIVERSITY OF PENNSYLVANIA Philadelphia, PA
Master of Business Administration Candidate; Major in Health Care Management 2016-2018

- Awarded Kaiser Fellowship, a partial-tuition scholarship in recognition of professional and academic achievements.
- VP for Community for Wharton Health Care Club, Secretary of Events for Wharton Politics & Public Policy Club, member of publications committee for 2017 Wharton Health Care Business Conference.

PERELMAN SCHOOL OF MEDICINE, UNIVERSITY OF PENNSYLVANIA Philadelphia, PA
Medical Doctor Candidate 2013-2018

- Received Twenty-First Century Scholarship, a full-tuition merit award for academic achievement and leadership.
- Served as quality improvement coordinator at United Community Clinic, a student-run clinic in West Philadelphia that provides primary care and helps patients sign up for insurance through the Affordable Care Act.
- Coordinated pilot and evaluation of a new electronic medical record optimized for mobile devices across multiple medical and surgical floors at the Hospital of the University of Pennsylvania.

HARVARD UNIVERSITY Cambridge, MA
A.B. in Economics 2006-2010

- Graduated *cum laude*, GPA: 3.75 / 4.00.

EXPERIENCE

HARVARD BUSINESS SCHOOL Boston, MA
Health Care Research Associate for Michael Porter 2012-2013

- Co-authored two business school cases with Michael Porter – the first on outcomes measurement at a German prostate cancer clinic, and the second about a bundled payment system in Stockholm County, Sweden.
- Aided in strategic planning and launch of the International Consortium for Health Outcomes Measurement, a non-profit devoted to fostering greater use of outcome measurement in health care by collaborating with physicians and patient advocates to create standardized sets of outcome measures for cross-clinic, national, and international comparison.

INSTITUTE FOR HEALTHCARE IMPROVEMENT (IHI) Cambridge, MA
Writer/Editor 2012-2013

- Wrote and edited posts for IHI's improvement blogs on topics ranging from medication adherence to home health care.
- Authored two IHI-published reports – the first on the health care policy landscape in the aftermath of the 2012 election, and the second, co-published by the Commonwealth Fund, on system-wide strategies to lower hospital readmissions.

NATIONAL JOURNAL Washington, DC
Economics Reporter 2010-2011

- Covered economic policy, including the federal budget, housing, the Federal Reserve, and U.S. job training programs.
- Assisted in organizing, writing for, and editing an economic policy newsletter sent each morning to thousands of subscribers.
- Researched policy topics, such as the root causes of persistently high unemployment, for events and magazine features.

THE HARVARD CRIMSON Cambridge, MA
Managing Editor 2009

- Led over 200 reporters and editors at Harvard's daily newspaper; oversaw daily management and long-term planning.
- Managed daily news section and weekly sports, arts, and magazine sections.
- Coordinated coverage of major news resulting in stories that gained national attention, including large-scale budget cuts in response to the financial crisis and a drug-related homicide on campus.

ADDITIONAL INFORMATION

- **Community Activities:** Volunteer Team Leader at Hillary for America; member of Penn interdisciplinary team partnering with the Camden Coalition to address the health and social needs of patients with frequent hospitalizations.
- **Interests:** Devouring political news/biographies, dive bars, playing guitar, running on Philadelphia's Schuylkill River Trail.

JULIE McCOMISH

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EDUCATION

THE WHARTON SCHOOL, UNIVERSITY OF PENNSYLVANIA **Philadelphia, PA**
Master of Business Administration Candidate; Major in Health Care Management **2016-2018**

- Organizer of Startup Expo for the 2016 People Analytics Conference coordinating all content and logistics
- Consultant on pricing strategy project for Philadelphia non-profit through Community Consultants
- Member of Human Capital Club, Health Care Club, Digital Health Club, and Marketing Club

YALE UNIVERSITY **New Haven, CT**
Bachelor of Science; Major in Psychology: 3.75 GPA **2006-2010**

- Active in Yale Women's Water Polo, Saybrook College Council, Rudd Food Policy Center, and *Yale Entrepreneur* magazine
- Honors: Saybrook Fellows' Award for outstanding leadership and community service; Psi Chi psychology honor society

EXPERIENCE

LIMEADE - Corporate wellness technology company with 160 employees **Bellevue, WA**
Director, Customer Success **2016**

- Managed recurring revenue and customer satisfaction for \$6.4M customer book of business; supervised 8-person team of Account Managers and Strategic Account Executives
- Devised customer satisfaction and retention strategies for 16 customers and managed team execution of plans; directly managed retention plans for high-risk customers with regular reporting to CEO and executive team

Director, Account Management **2015-2016**

- Led team of 17 account management professionals responsible for managing wellness programs and day-to-day customer relationships for 40 accounts with ~825,000 eligible users
- Developed organizational plan to re-structure Account Management team to improve customer satisfaction, optimize staffing ratios, and improve low employee satisfaction; oversaw hiring and team expansion from 5 to 19 employees
- Created multi-modal onboarding curriculum for new hires that significantly improved product knowledge and reduced average time to performance from 12 weeks to 8 weeks

Account Manager **2014-2015**

- Designed custom wellness programs for 10 enterprise clients ranging from 5,000 to 26,000 employees based on customer objectives and employee health data; supported periodic program review and improvement
- Executed wellness programs, including managing web platform configuration, developing program content, and implementing employee-facing engagement strategies

MICROSOFT – On-site consultant through Allyis Consulting **Redmond, WA**
Program Manager, Channel Incentives Strategy Team **2013-2014**

- Provided strategy, design, and implementation support for global OEM Marketing incentive programs paying out ~\$2B per year to multi-national, distributor, and reseller channels covering Windows Client, Office, and Server products
- Managed annual strategy review with executive stakeholders including group GM; developed strategy proposal, coordinated with key worldwide stakeholders to ensure alignment on recommendations, and prepared materials for executive sponsors
- Performed impact analysis including incentive forecasting and regional market reviews for payout structure changes

Program Manager, Channel Incentives Training and Readiness Team **2012-2013**

- Supported global change management process for OEM incentive program updates including building all communication materials, leading global trainings, and tracking market readiness for external sales partners and internal stakeholders

Business Analyst, Channel Incentives Strategy Team **2011-2012**

- Synthesized data from diverse sources into C-level quarterly business reviews on incentive program spending, utilization, and effectiveness; managed data quality and input into Access database

WUNDERMAN – Digital and relationship marketing agency **Seattle, WA**
Associate Account Executive **2010-2011**

- Managed Microsoft's Mid-Market Relationship Program including planning, budgeting, executing, and reporting for 73 monthly email and direct mail communications and ad-hoc projects such as competitive and trend analyses

ADDITIONAL INFORMATION

- **Interests:** Volunteer for Hipcooks cooking school, three-time triathlete, competitive tennis player through USTA
- **Community Involvement:** Co-founder of the Young Professionals Network for Girl Scouts of Western Washington, Site lead for Seattle Parks and Recreation QuickStart Youth Tennis League

LAUREN MILLER

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EDUCATION

THE WHARTON SCHOOL, UNIVERSITY OF PENNSYLVANIA **Philadelphia, PA**
Master of Business Administration Candidate; Major in Health Care Management **2016-2018**

- Awarded 2 year merit-based Kaiser Fellowship for professional, academic, and personal achievement
- InSITE Fellow, Content Chair of Wharton Healthcare Conference, active member of Health Care Club, Digital Health Club, Wharton Women in Business

PERELMAN SCHOOL OF MEDICINE, UNIVERSITY OF PENNSYLVANIA **Philadelphia, PA**
Doctor of Medicine Candidate **2013-2018**

- Honors: Awarded 4 year merit-based William Maul Measey Scholarship (\$25,000 per year), inducted member of Gold Humanism Honor Society (top 20% of class)
- Leadership: Medical student government class co-chair 2015-2017, admissions committee board member (1 of 10 students), Elizabeth Blackwell Society president, Otolaryngology group treasurer, neurosurgery and otolaryngology research

UNIVERSITY OF PITTSBURGH **Pittsburgh, PA**
Bachelor of Science in Neuroscience; Minors in Chemistry, Spanish; Certificate in Bioethics **2009-2013**

- Honors: Graduated *summa cum laude*, GPA 3.92/4, departmental honors, named top 10 "Pitt Seniors of the Year"
- Awarded 4 year full academic scholarship (~\$30,000/year)
- Resident assistant, teaching assistant, extensive neurobiology research, co-founded campus group, studied abroad in Spain

EXPERIENCE

INTERSECT ENT **Menlo Park, CA**
Clinical Affairs Intern **Summer 2016**

- Managed 8 projects spanning clinical affairs, digital marketing, reimbursement and health economics, and quality
- Built literature database from 150+ articles and presented market size findings 4 times to C-level executives and senior management, recommending redistribution of resources which resulted in a change of clinical trial design/marketing strategy
- Initiated a prospective multicenter study by developing a protocol, leading meetings with two primary investigator physicians and internal senior management, and heading IRB organization for clinical physicians
- Organized a marketing strategy to target a 100,000 patient market by creating diverse promotional materials, designing a landing page and two microsites, and evaluating initial data analytics for sites
- Analyzed pivotal data from two multimillion dollar clinical trials, presented findings to senior management as well as entire clinical affairs department, and ghostwrote methods, results, and discussion section of manuscript draft for both clinical trials
- Created an iterative template for internal white papers to use with FDA product complaint handling, expected to decrease internal complaint handling by 50%; co-authored two subsequent internal white papers

PENN CENTER FOR INNOVATION (PCI) **Philadelphia, PA**
PCI Technology Transfer Fellow **2014-2016**

- Performed over 25 university invention assessments from a technical, commercial, and intellectual property perspective to help steer potential licensing or other further development
- Assessed companies' portfolios in the context of current Penn intellectual property and constructed 7 non confidential summaries for use in commercialization strategy development

EARLY STAGE MEDICAL DIAGNOSTICS COMPANY **Philadelphia, PA**
PBG Healthcare Consultant **Fall 2015**

- Worked on a team of 7 to formulate a market strategy and identify appropriate biomarkers for diagnostic product
- Developed regulatory process strategy, interviewed industry professionals, provided final short term strategic recommendations to CEO

ADDITIONAL INFORMATION

- **Interests:** Hiked Camino de Santiago (across France, Spain), significant volunteer work in adolescent homeless shelters, ran three half marathons, wake boarding and water skiing, women's (touch) rugby, Andes mountaineering venture December 2016

BRENT MULLER

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EDUCATION

THE WHARTON SCHOOL, UNIVERSITY OF PENNSYLVANIA

Philadelphia, PA

Master of Business Administration Candidate; Major in Health Care Management

2016-2018

- Awarded Health Care Kaiser Fellowship in recognition of professional and academic achievements
- VP Communications, Digital Health Club; VP Race Planning, Roadrunners & Triathletes Club; VP Finance, Food Club
- Active member of Wharton Health Care Club, Public Speaking Club, and Tennis Club
- GMAT: 760 (99th percentile)

YALE UNIVERSITY

New Haven, CT

Bachelor of Science in Chemistry with honors | GPA: 3.77

2007-2011

- Awarded Kingsley Summer Travel Fellowship for independent study of Roman architecture in Italy, Switzerland, and France
- Served as a Freshman Counselor; Mentored eight freshmen on academic, social, and cultural issues during college transition

EXPERIENCE

OLIVER WYMAN

Boston, MA

Associate

2015-2016

Senior Consultant

2014

- Led teams of 2-4 consultants on 10 projects, primarily in the health care, B2B software, and grocery industries
- Project types include: growth strategy, competitive assessment, pricing and promotions effectiveness, financial modelling, market sizing, commercial due diligence, and business development

Selected project experience:

- Led a team of 4 consultants in the commercial due diligence of a \$50M publisher of health care and workplace compliance content; Uncovered red flags on the target's financials and led the client to discontinue the deal
- Assessed the market size, growth, and competitive environment for population health software and analytics; Designed the final deliverable and presented it to the GM, COO, and other stakeholders
- Developed 5-year revenue model projections based on reimbursement rates and projected market growth variables for a \$15B health care services company; Facilitated strategy retreat among senior management
- Developed growth strategy for \$20M post-market surveillance provider; Presented recommendations to the board of directors

OC&C STRATEGY CONSULTANTS (now Oliver Wyman)

Boston, MA

Consultant

2014

Associate Consultant

2012-2013

- Managed teams of 1-2 consultants on 11 projects in the health care and B2B software industries
- Trained new employees in Microsoft Excel data analysis and web survey best practices
- Project types include: customer segmentation, pricing, portfolio assessment, business unit integration, growth strategy, and commercial due diligence

Selected project experience:

- Coordinated the integration of sales forces and product management for two business units of a \$500M health analytics firm
- For a life sciences information company, developed strategic recommendations for each of 80 product lines based on internal and external interviews and profitability analysis; As a result, client merged or discontinued ~20 product lines
- Identified 12 customer segments for a \$1B tax software provider through surveys and market interviews; Implemented the segmentation framework in client's internal databases and trained product managers and sales reps on the segment profiles

THE LUCAS GROUP

Boston, MA

Associate Consultant

2011-2012

- Executed cost and quality analysis using federal and Kaiser Foundation data to support a southern state's Medicaid reform
- Evaluated the value propositions and competitive positioning of four target companies on commercial due diligence projects

ADDITIONAL INFORMATION

- **Community Leadership:** Challenge Event Chair for the JDRF New England Young Leadership Committee – organized and led a charity team of 12 runners for 200-mile Ragnar race and raised over \$15,000 for JDRF
- **Interests:** Running, completed first marathon in May 2016 (San Luis Obispo, CA); backpacking and fishing in the Stanislaus and Ansel Adams forests; SCUBA, lobster diving off Massachusetts coast; home-brewing, brewed hoppy beer since 2012

JOSHUA OSTLER

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EDUCATION

THE WHARTON SCHOOL, UNIVERSITY OF PENNSYLVANIA **Philadelphia, PA**
Master of Business Administration Candidate; Healthcare Management and Strategic Management **2016-2018**

- Member of Wharton's Healthcare Club, Consulting Club, Wharton Community Consultants and Public Speaking Club
- Kaiser Fellowship Award Recipient

BRIGHAM YOUNG UNIVERSITY **Provo, UT**
Bachelor of Arts in Communications, cum laude **2006-2012**

- GPA: 3.87 | GMAT: 740 | Passed CFA Level 1 Exam
- Extracurricular Impact: Vice President of BYU Investment Banking Club, BYU Finance Society
- Merit-based Scholarships: Brigham Young Scholarship, Peery Institute CFA Scholarship

EXPERIENCE

THE ENSIGN GROUP **San Diego, CA**
Seaport Home Health and Hospice
Executive Director **2014-2016**
Cluster Leader **2015-2016**

- Led acquisition, turnaround strategy and ongoing management of a Medicare certified home health care division with over 50 employees providing care to ~150 seniors each day in the San Diego area
- Held full financial and general management responsibility for all departments including Operations, Marketing, Billing, Clinical Outcomes and Human Resources comprising ~\$4.8M in annual revenue
- Introduced an innovative organizational vision, culture and processes that resulted in a return to profitability the first month under ownership, 100% revenue growth in the first year, and significantly enhanced employee satisfaction
- Agency achieved 5-Star rating for clinical quality less than 12 months after being rated 2-Star upon acquisition
- Promoted to increased scope of responsibility in 2015 to Southern California and Arizona as Cluster Leader. Implemented successful best practices from San Diego to 6 additional operations representing ~\$16M in annual revenue

GOLDMAN SACHS & CO. **Los Angeles, CA**
Private Wealth Management
Financial Analyst **2012-2014**
Summer Financial Analyst **2011**

- Key member of one of the firm's top 5 largest teams managing ~\$11BN of client assets in complex portfolios
- Oversaw portfolio allocation, review, cash planning and tactical investment implementation across a broad range of traditional and non-traditional investment instruments.
- Established strong communicative relationships with internal product groups and leveraged their expertise to formulate impactful client portfolio recommendations
- Developed, modeled and project-managed a 15-month implementation proposal for a \$1BN client, rebalancing across 11 entities and 130+ sub-accounts

VIBES A CAPPELLA **Mesa, AZ**
Founder and General Manager **2003-2012**

- Founded and managed a six-man singing group that entertained audiences in Utah, Arizona and New York
- Oversaw the recording, production and distribution of two albums, "On the Rise" (2006) and "Sunday Best" (2011)

ADDITIONAL INFORMATION

- **Community Impact:** Participated in a two-year LDS mission, giving individual and community service and leading 180 missionaries in Seattle, Washington (2007-2009)
- **Awards:** Boy Scouts of America - Eagle Scout (2003), 1st Chair Vocal Bass in Arizona (2006)
- **Global Travel:** (16 countries) including a Heifer International study-tour in Uganda and Rwanda evaluating the causes of poverty and examining methods to improve subsistence strategies
- **Interests:** Tennis, basketball, American football, classical music and public policy

ROYA RASHTCHI

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EDUCATION

THE WHARTON SCHOOL, UNIVERSITY OF PENNSYLVANIA Philadelphia, PA
Master of Business Administration Candidate; Major in Health Care Management 2016-2018

- Recipient of Forté Fellowship for “exemplary leadership”
- Member of Health Care Club, General Management Club, Welcome Committee

THE WHARTON SCHOOL AND HUNTSMAN PROGRAM, UNIVERSITY OF PENNSYLVANIA Philadelphia, PA
Bachelor of Science in Economics; Concentrations in Finance, Operations & Information Management 2007-2011
Bachelor of Arts; Major in International Studies

- GPA: 3.9/4.0, *summa cum laude*, Beta Gamma Sigma honors society
- Recipient of Wharton’s Beverly Virany Award for “demonstrated leadership, scholarship, and good character”
- Research: Analysis of various business models for delivering maternal health to remote communities in Mexico via mobile health solutions; interviewed various stakeholders, including Mexican Ministry of Health and Carlos Slim Health Institute

EXPERIENCE

BAIN & COMPANY Los Angeles, CA
Consultant 2015-2016
Senior Associate Consultant 2014-2015
Associate Consultant 2012-2014

- Earned highest rating on all reviews (top ~10% of class); consistently recognized for taking end-to-end ownership, being solution-oriented, and developing direct reports (managed four associate consultants across three teams)
- Selected to develop and present ‘Bain point of view’ on evolving healthcare landscape to biopharma companies’ COOs
- Requested by Executive Director at client to work with him on assessing biotech co.’s real world data capabilities for CEO

Selected experience

- Led hybrid Bain-client team at \$100B+ biotech co. in identifying and managing 10 initiatives to reduce R&D cycle time, including eliminating duplicated work and co-locating teams; identified efficiencies to reduce R&D cycle time by 18 mo.
- Assessed competitive biotech landscape and facilitated client workshops to identify pain points in Process Development org. of 850+; analysis contributed to integration of org., consolidation of 14 sites to 4, and reduction in spend by ~\$800M
- Developed case for use of genetic, epidemiological and electronic medical record data to enhance clinical and economic value of drugs; resulted in CEO approval of \$20M funding for data platform
- Created new product strategy for R&D organization of \$150B+ semiconductor company to increase ROI in mobile segment; strategy enabled \$1B savings through streamlined product offering and prioritized feature changes, which reduced iterations
- Built model to quantify cybersecurity company’s markets and executed survey with 500+ respondents to assess product appeal; insights resulted in redesign of \$1B product portfolio, leading to 5% revenue growth and 3% gross margin expansion

QUINTILES (*World’s largest contract research organization for biopharmaceutical development*) Durham, NC
Manager, Strategy 2015

- Developed mobile health strategies for CTO and Head of Digital Health Acceleration aimed at enhancing clinical trials and improving post-commercialization outcomes to address provider/payer interest in real world effectiveness
- Led cross-functional team to establish case for remote monitoring of clinical sites that would decrease trial costs by ~20%
- Identified therapeutic areas for differential investment and canvassed the sector for high priority acquisition targets to enhance position in selected therapeutic areas; resulted in initiation of multiple discussions with target companies

BANK OF AMERICA MERRILL LYNCH New York, NY
Investment Banking Analyst, Financial Sponsors Group 2011-2012

- Built leveraged buyout model to assess ability of leading medical device and pharmaceutical packaging manufacturer to increase debt level; resulted in issuance of \$485M senior secured bond; worked with lawyers to devise credit agreement and led development of investor materials; selected to join roadshow to advise CEO and CFO on talking points with investors
- Led market diligence and built M&A model to assess attractiveness of merging two leading financial software companies; worked directly with VPs of private equity firm to assess synergies from merger; resulted in \$2.1B leveraged buyout

ADDITIONAL INFORMATION

- **Interests:** Trapeze; ancient Greek philosophy; art journaling
- **Languages:** Fluent in Spanish; worked in Panama for 3 months, conducted research in Mexico and studied in Madrid
- **Positions:** Huntsman Alumni Council, Curriculum Lead: Evaluated curriculum to ensure alignment with global trends

AMANDA ROBISON

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EDUCATION

THE WHARTON SCHOOL, UNIVERSITY OF PENNSYLVANIA

Master of Business Administration Candidate; Healthcare Management

Philadelphia, PA

2016-2018

- VP of Analytics Digital Healthcare Club, VP Academics Return on Equality
- Research Assistant for Dr. Robert Burns

DUKE UNIVERSITY

Bachelor of Science of Engineering, Major in Biomechanical Engineering

Durham, NC

2007-2011

EXPERIENCE

MCKINSEY HEALTHCARE ANALYTICS

Pre-MBA Intern

New York, NY

Summer 2016

- Supervised creation of a new data science capability and designed an integration plan enabling use for client work
- Revitalized an internal tool for Episodes of Care to determine appropriate prioritization of episodes

THE ADVISORY BOARD COMPANY

Director, Data Science R&D, Corporate Strategy

Associate Director, Data Science R&D, Corporate Strategy

Senior Analyst, Data Science R&D, Corporate Strategy

Analyst, Corporate Strategy

Washington, DC

2015-2016

2013-2015

2012-2013

2011-2012

- **Experience in:** Bundled payment models, Claims data, quality metrics, physician referral management, population health analyses, coding and reimbursement, predictive models, machine learning
- **Programming:** SQL, Hadoop, Matlab, SAS, R, Mathematica
- Developed data strategy, relationship management, and creation of predictive models and analytics for several new products including one with \$1.6M in sales to date and projected at \$150M within three years
- Evaluated data resources and performed complex data analyses from a \$850M acquisition resulting in two new product offerings to be launched in 2016
- Researched, conceptualized, and implemented a new data science R&D team for the Higher Education Division and reworked the Healthcare R&D team including: development of new reporting structures; team vision and organization; and engagement initiative this resulted in selection for the highly-competitive firm-wide 2015 Fellowship for Emerging Leaders
- Designed intellectual property strategy and recognition plan for the firm and increased patent filings 10-fold

HOSPITAL FOR SPECIAL SURGERY

Intern Technology and Intellectual Property Development

New York, NY

Summer 2010

- Gauged technological, financial, IP, business, and manufacturing feasibility for 15+ orthopedic devices
- Wrote disclosures, executive reports, technical briefs, and business plans on over two dozen new inventions

ADDITIONAL INFORMATION

Special Love for Children with Cancer

Board Member

Volunteer

Washington, DC

2015-2018

2011-2015

- Presented business case for purchase and implementation of a new donor management system and a dedicated fundraising staff member leading to a 30% increase in revenue across 3 years

Compass Probono

Junior Board Chair

Volunteer

Washington, DC

2014-2016

2011-2016

- Assisted the Board of Directors in developing a geographic expansion plan including budget and governance recommendations resulting in successful launch of second Compass chapter in Philadelphia and third in Chicago

JULIE SEGNER

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EDUCATION

THE WHARTON SCHOOL, UNIVERSITY OF PENNSYLVANIA

Philadelphia, PA

Master of Business Administration Candidate; Major in Strategic Management

2016-2018

- Awarded Craig K. Harding Endowed Fellowship for outstanding academic and professional accomplishments
- Selected as one of 32 paid consultants for Wharton's Small Business Development Center - serve new client every week with tailored problem-solving and business growth insights

DUKE UNIVERSITY

Durham, NC

Bachelor of Arts in International Comparative Studies, Spanish Minor, Global Health Certificate

2006-2010

- Academic Honors: 3.75 GPA, *cum laude*, Dean's List (2007, 2008, 2009), Order of Omega (2008-2010)
- Leadership: President, Delta Gamma Sorority; Member, Club Water Polo team - organized trip to tournament in Greece after applying for and winning funding through competitive Gorter Dream Trip endowment
- Activities: Study Abroad participant in Buenos Aires, Argentina

EXPERIENCE

TRIAGE CONSULTING GROUP

San Francisco, CA

Senior Associate

2013-2016

- Analyzed financial impact of business office consolidation for a \$5B revenue hospital client and presented analytics to VP of Revenue Cycle; led to centralized case management and \$2M in additional revenue from reduction in insurance claim denials
- Initiated and conducted monthly trainings for hospital to improve denials management process, reducing claim denials volume 15% and boosting revenue by \$800K
- Analyzed Triage contingency fee structure for hospital client, identifying competitive threat and recommending restructured fee; persuaded client to maintain Triage as primary consulting team and preserved \$10M in annual revenue
- Increased hospital client revenue recovery rate by 12% by consolidating team structure, establishing best-practice documentation process, and incentivizing team through weekly and monthly goals; resulted in highest revenue client in 2015
- Led firm's largest team of 20 Associates, providing career planning, performance evaluations, and mentoring with all Associates on-track for promotion; most sought after team by current Associates per Staffing Director
- Selected to join internal knowledge team to analyze Medicare claims regulations; collaborated with internal Clinical and Coding teams, identifying new opportunity to increase reimbursement across clients for additional \$2M firm revenue
- One of three Senior Associates, out of 150, to receive the 2015 Client Service Award for exceeding client needs

Associate

2012-2013

- Selected by Principal to manage client project four months after start-date, 17 months ahead of peers
- Conducted in-depth analysis of claims for five healthcare systems, increasing revenue recovery by 20%
- Diagnosed inefficiencies in non-profit hospital client's implant tracking system, recommending process improvement to client, leading to \$300K in additional revenue

DUKE-NATIONAL UNIVERSITY OF SINGAPORE GRADUATE MEDICAL SCHOOL

Singapore

Education Research Officer

2010-2011

- Developed research project and analyzed data using statistical regression revealing link between academic performance and empathy levels among med students in team-based learning environment
- Proposed new program to Vice Dean of Education and launched new fitness and elective programming for medical students promoting self-care to increase empathy

ADDITIONAL INFORMATION

- **Leadership:** MedShare Board Member (2015-2016), MedShare-Triage liaison (2013-2016), and volunteer (2012-2016); Duke SF Young Alumni Development Board Member (2015-2016) and Council Member (2013-2016)
- **Interests:** live music fanatic, scuba diver, amateur hockey player, taco enthusiast, undergraduate mentor through (GUIDE)
- **Languages:** Proficient in Spanish

ANITA SEKAR

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EDUCATION

THE WHARTON SCHOOL, UNIVERSITY OF PENNSYLVANIA

Philadelphia, PA

Master of Business Administration Candidate; Major in Health Care Management

2016-2018

- GMAT: 770 (99th Percentile). Awarded merit-based Joseph Wharton Fellowship.
- InSITE Fellow: Engage in semester-long projects with local start-ups and venture capital firms.
- Clubs: Technology, Private Equity & Venture Capital, Healthcare, Innovation & Design, Wildmen Hockey.

BROWN UNIVERSITY

Providence, RI

Bachelor of Arts in Economics and Classics

2006-2010

- GPA: 3.77. Graduated *magna cum laude*.
- Division I Golf team member, Brown Classical Journal Editor, Undergraduate Finance Board Secretary.

EXPERIENCE

CAREPORT HEALTH (*Venture-backed healthcare technology start-up*)

Boston, MA

Director, Product Strategy and Operations

2013-2016

- As employee number one, supported successful growth strategy from inception through Series A funding.
- Launched three products and directed five enterprise software implementations at top-tier health system clients including the Cleveland Clinic, Montefiore Medical Center, and Mercy Health.
- Managed product requirements and roadmap by synthesizing input from CEO, outside experts, end-users, prospective customers, market trends, competitors, and potential partners; worked with development team to implement roadmap.
- Increased sales pipeline by 150% by developing demos and sales materials, writing collateral content, contributing to thought leadership webinar series, and speaking at conferences.
- Led implementation team in development of user training materials and support workflows.

GEMINI INVESTORS (*Lower middle market private equity firm with \$500M AUM*)

Wellesley, MA

Private Equity Associate

2012-2013

- Authored Investment Committee memo for \$2.5M recapitalization of franchise business, including financial projections, competitive landscape, and analysis of member volume and sales trends.
- Sourced and conducted over 25 customer interviews for a portfolio company add-on acquisition.
- Enabled portfolio company to secure \$500K follow-on investment by working with CFO to project additional capital needs and presenting findings to Investment Committee.
- Screened two to five new investments per week. Assisted in structuring and issuance of term sheets.

THE LUCAS GROUP (*Boutique management consultancy*)

Boston, MA

Senior Associate Consultant

2012-2012

Associate Consultant

2010-2011

- Led two junior colleagues in design and implementation of online survey to assess purchasing behavior for due diligence of lab equipment manufacturer; quantified near-term growth opportunities of \$12M.
- Evaluated industry dynamics of international foodservice markets for Fortune 500 distributor; outlined international entry strategy which motivated executive leadership team to approach an acquisition candidate.
- Analyzed large flight dataset of national emergency air medical services provider and developed model to assess whitespace growth opportunities; presented findings to private equity client.
- Led Brown University recruiting including company info session and candidate interviews.

ADDITIONAL INFORMATION

- **Technical Skills:** SQL (beginner), Google Analytics, WordPress, Sketch, Wireframing, User Interface Design.
- **Interests:** Healthcare reform, Hack-a-thons (placed 3rd in Athenahealth competition), Golf (played for 18 years), Traveling (visited 15+ countries), Mentoring (Minds Matter of Boston Executive Committee member).

KENGO TASHIRO, M.D.

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EDUCATION

FULBRIGHT PROGRAM SCHOLAR	2016 – May 2018
THE WHARTON SCHOOL, UNIVERSITY OF PENNSYLVANIA <i>Master of Business Administration Candidate; Major in Health Care Management and Finance</i> <i>Vice President (1y) of Wharton Health Care Club</i>	Philadelphia, PA 2016 – May 2018
HARVARD MEDICAL SCHOOL <i>Primary Care, Internal Medicine Training Program</i>	Boston, MA Oct.-Nov. 2012
UNIVERSITY OF KYOTO <i>Medical Doctorate, Faculty of Medicine</i>	Kyoto, Japan 2005-Apr. 2011

EXPERIENCE

REMIGES VENTURES <i>Part Time Internship at a venture capital focusing on pharma & life sciences</i>	Tokyo, Japan May 2016 - Jul 2016
CENTRAL INSTITUTE FOR EXPERIMENTAL ANIMALS <i>Part Time Intern Researcher in Genetic Engineering, Humanized Mice & Immunology Department</i>	Tokyo, Japan May 2016 - Jul 2016
GLOBAL COLLABORATION CENTER - Seconded from Ministry of Health, Welfare & Labor <i>Founding Member & Chief Medical Officer</i> <ul style="list-style-type: none">GCC is a first of its kind, government established technology incubator, forming public-private consortium and creating global partnerships to accelerate innovation and strategic deployment of Japanese health care technologies.Researched, evaluated and selected high potential drugs, devices and healthcare IT technologies among Japanese companies; recruited companies into membership; and consulted on their key technology development projects. Member companies that joined and funded GCC included Konica, Hitachi, Fujifilm, Mitsubishi group and NTT group companies, and Sony, as well as small to medium enterprises.Consulted these companies starting at healthcare company CEO/executive level, on market/competitor analysis, product design, development strategy, funding strategy, global marketing strategy and global partnership strategy. Worked side by side with R&D manager level to design clinical trials, overcome regulations, negotiate clinical trial terms, draft grant applications, create profit projection models and leverage academic/political leaders while managing overall progress.Spearheaded negotiation and successful signing of partnerships with Brigham Women's Hospital, Massachusetts General Hospital, Stanford University, National University of Singapore, Singapore Agency for Science, Research and Technology, French CVT-Sud, and INSERM P4-Lab. Managed communication and relationship building with these institutes' key political/academic leaders.Led successful planning, negotiation, design and launch of joint clinical trial in Singapore on medical screening device involving 500 patients. Core member of constructing facility for genetic engineering and drug development through strategic partnership between Singapore and Japan; submitted and obtained US\$ 16million grant from Singapore government.Directed partnership strategy between US and Japanese company on healthcare data analytics resulting in grant of US\$ 7 million won from AMED (Japanese equivalent of NIH). Designed development strategies of three disruptive imaging technologies and two treatment devices, worked as core project member and ran clinical trials at Massachusetts General Hospital, Stanford Medical Center and Brigham Women's Hospital.	Tokyo, Japan 2013-2016
KANAGAWA PREFECTURE GOVERNMENT— Concurrent seconded position <i>Speechwriter & Healthcare Policy Assistant for the Governor of Kanagawa Prefecture</i> <ul style="list-style-type: none">Kanagawa Prefecture is largest state adjacent to Tokyo, with approximate economic size equal to that of Thailand. Transferred from ministry - by the request of the governor - to assist his healthcare policymaking. Attended key meetings and foreign missions to drive key initiatives of Healthcare Special Zone and disease prevention.	Tokyo, Japan May 2016 - Jul 2016
MINISTRY OF HEALTH, WELFARE AND LABOR <i>Accepted as Ministry Official (First Class) –Immediately seconded to Kanagawa Prefecture</i>	Tokyo, Japan 2013-2016
KITANO HOSPITAL, A TAZUKE RESEARCH INSTITUTE <i>Medical Resident in one of the best training hospitals (Ranked 14th/ 906 programs by Ministry of Health WL)</i> <ul style="list-style-type: none">“Distinguished Presentation Award”, 67th General Meeting of the Japanese Society of Gastroenterological Surgery“Award of Excellence for the Best Resident of The Year” among 20 resident peers (voted by section chiefs and chief nurses), given scholarship to study at Harvard Medical School	Osaka, Japan 2011-2013

ADDITIONAL INFORMATION

Extensive Overseas Work Experience: Numerous business negotiations and backpacking trips in US, EU, Asia, Egypt
Extracurricular Leadership: Junior captain of Kyoto University Medical Tennis Team, Kamiyama Entrepreneurship Fellow
Language: TOEFL 117/120, Experience as English-Japanese Simultaneous Translator around Kyoto heritage sites

MICHELLE TING

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EDUCATION

THE WHARTON SCHOOL, UNIVERSITY OF PENNSYLVANIA

Philadelphia, PA

Master of Business Administration Candidate; Major in Strategic Management

2016-2018

- Director, Employer Relations of Wharton Consulting Club; Vice President, Social of Digital Health Club
- Member of Health Care Conference Committee, Health Care Club, Global Health Volunteers, and Human Capital Club

DARTMOUTH COLLEGE

Hanover, NH

Bachelor of Arts in Government and Asian and Middle Eastern Studies

2006-2010

- President of Dartmouth Chinese Dance Troupe; Social Events Manager of Greek Leadership Council; Member of Special Programs and Events Committee
- Intern, Energy and Retail Divisions, U.S. Commercial Service at U.S. Consulate in Shanghai, P.R.C.
- Intern, Office of the Secretary, U.S. Department of Labor
- Alumni Interviewer, Undergraduate Admissions; Volunteer, Dartmouth College Fund; Regional Chair (Philadelphia), Dartmouth Asian Pacific American Alumni Association

EXPERIENCE

KORN/FERRY INTERNATIONAL – *global people and organizational advisory firm; largest provider of executive search in the world*

Philadelphia, PA

Senior Associate, Healthcare Services/Life Sciences and Higher Education

2014-2016

Associate, Healthcare Services/Life Sciences and Higher Education

2013-2014

- Youngest Senior Associate in firm nationwide; assumed responsibilities of both Research Associate and Senior Associate that led to accelerated promotion process. Throughout career, accountable for 60+ engagements totaling \$10M+ in revenue
- Managed clients throughout search life-cycle, including due diligence, candidate presentations, referencing, and offer negotiation – team's average client satisfaction rating was 95%
- Executed simultaneous assignments – prioritized strategic mandates and developed corresponding critical competencies, assessed candidate pools, presented opportunities to marketplace, conducted interviews, and provided feedback to candidates. Key engagements include: search for CEO of academic-commercial joint venture generating \$185K in revenue; recruitment of a Chief Medical Officer to Ameritox that produced \$225K in revenue
- Led teams on leadership searches for 10% of ranked U.S. business schools and public universities, with repeat business success rate of 77%
- Developed first mentorship program across all levels (Partners, Associates and Administrative Staff) of firm's three business units to support new corporate mission of cross-collaboration – piloted in Philadelphia office with 46 participants in 2015

Research Associate, Healthcare Services

2012-2013

- Managed research activities for 12 partners nationwide: executive search strategy development, candidate identification, market research and business development research
- Conducted research consulting projects for clients, including mapping organizational structures of target companies and compensation studies of relevant executive groups; Projects resulted in 90% conversion rate

J. ROBERT SCOTT – *a Fidelity Investments company*

Boston, MA

Researcher, Higher Education/Not-for-Profit and Life Sciences

2010-2012

- Conducted market research across target industries for two U.S. offices and four international offices; performed due-diligence of potential client and target organizations to help firm determine viability of searches
- Researched, synthesized and presented findings on industry/candidate pool trends; authored pitch books, position specifications and candidate appraisals

THE BRONZED BEE, LLC – *a custom airbrush tanning and waxing boutique*

Philadelphia, PA

Co-Founder/Chief Operating and Business Officer

2013-2016

- Managed operational finances, marketing, construction, and hiring; currently employ three estheticians and one manager
- Developed and presented business plan to investors and secured \$20K in seed funding – first year revenue exceeded \$100K
- Earned \$12K in monthly revenue year to date, with net profit margins of 18% from product sales and services
- Secured additional space to support expansion and extend additional service offerings due to client interest

ADDITIONAL INFORMATION

Volunteer: Philadelphia Futures, Cooper University Hospital Trauma Center

Interests: Squash, Running, Kayaking, Hiking, Travel planning, Leading an unofficial food club for Wharton MBAs

Languages: Mandarin and Shanghainese (fluent), Cantonese and Spanish (conversational)

ALLISON E. TOMAN

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EDUCATION

THE WHARTON SCHOOL, UNIVERSITY OF PENNSYLVANIA

Master of Business Administration Candidate; Major in Health Care Management

Philadelphia, PA
2016-2018

- Joseph Wharton Fellowship Recipient
- Member of Dean's Advisory Committee, Wharton Impact Investing Partners, Health Care Club (Health Care Conference Board Member), General Management Club

UNIVERSITY OF CHICAGO

Bachelor of Arts in History and International Studies (Double Major), Department and General Honors

Chicago, IL
2005-2009

- GPA: 3.7/4.0; Deans List; awarded International House Fellowship for academic excellence and community leadership
- Member, Varsity Cross Country, Varsity Indoor Track, and Varsity Outdoor Track teams
- Elected Representative to Executive Board of Varsity Athletic Council, chaired student fundraising events raising over \$500K and sponsored legislation expanding funding for varsity women's athletics approved by the Board of Trustees

EXPERIENCE

HEALTHSCAPE ADVISORS

Manager

Senior Consultant

Consultant

Chicago, IL
2015-2016
2012-2014
2009-2012

SELECT ENGAGEMENTS:

Guided large Blue Cross plan in the strategic development and execution of innovative, value-based partnerships with six major health systems (2016)

- Advised Chief Medical Officer and client executive team in identifying clinical strategies projected to save \$50M in year one
- Managed team of six consultants in conducting detailed SQL claims analysis and constructing a financial evaluation framework to hone in on key membership attributions, prioritized savings opportunities, and progress against \$50M savings target
- Facilitated weekly meetings with client and health system executives to align on clinical strategy and investment opportunities

Directed Blue Cross plan in RFP procurement process, evaluation, and selection of its new dental managed care vendor (2015)

- Spearheaded cross-functional team of ten consultants and client SMEs in devising RFP and conducting due diligence process
- Designed bidder evaluation system and oversaw executive team's selection of new dental vendor, resulting in revenue growth of 15% and margin improvement of 2% year-over-year by outsourcing provider network, clinical, and back-office functions

Created long-term government markets strategic business plan for Fortune 50 Pharmacy Benefits Manager (2015)

- Formulated key strategies for growth in Medicare, Medicaid, and Exchange markets resulting in \$25M incremental revenue
- Cultivated alignment across executive management team through targeted, one-on-one discussions on proposed strategies

Advised leading global private equity firm on the acquisition of a behavioral health company, creating the largest stand-alone behavioral health management company in the United States (2014)

- Supervised team of five consultants in due diligence, deliverable creation, and quality assurance
- Orchestrated development of federal market due diligence report to support executive level decision-making and educate lenders
- Counseled executive management on federal market industry trends, competitive positioning, and financial valuation

Led internal initiatives and business development for over a dozen revenue-generating engagements (2009-2016)

- Headed development of HealthScape's companywide training program that improved staff efficiency by expanding industry knowledge and building skillsets, like SQL coding and Excel financial modeling, needed to succeed in client engagements
- Guided hiring and development of HealthScape consultants, including interviewing, training, and mentoring
- Designed and guided eight-week summer intern project, serving as management liaison and facilitating weekly updates

ADDITIONAL INFORMATION

- **Positions:** Board Member, University of Chicago Club of Boston; Board Member and Mentor, Minds Matter of Chicago: co-chaired Event Planning committee, raising over \$1M for student scholarships to college and summer programs
- **Interests:** Traveling to exotic locations (Galapagos, Lombok, Suzhou, etc.), cooking, reading non-fiction, indoor cycling, Pilates

JOHN XAVIER R. VALDES

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EDUCATION

THE WHARTON SCHOOL, UNIVERSITY OF PENNSYLVANIA

Philadelphia, PA

Master of Business Administration Candidate; Major in Health Care Management

2016-2018

- Awarded the Kaiser Fellowship (partial scholarship) upon admission
- GRE – 168 Quantitative (95th percentile), 165 Verbal (95th percentile); TOEFL – 117/120
- Wharton Community Consultants: current engagement explores profit-boosting strategies for local non-profit therapy center
- Consulting Club, Health Care Club

ATENEO DE MANILA UNIVERSITY

Quezon City, Philippines

Bachelor of Sciences in Health Sciences, Minor in Economics

2009-2013

- Graduated magna cum laude with GPA of 3.82/4, Ranked #8 in graduating class of over 2,000
- Freshman Merit Scholar (full scholarship for top 30 accepted applicants)

EXPERIENCE

EPIMETRICS, INC. | *EpiMetrics is a for-profit public health research institution*

Paranaque City, Philippines

Co-Founder, Chief Financial Officer, and Researcher

2015-2016

- Won \$500k in project contracts in EpiMetrics' first year; wrote project proposals and technical reports, and executed studies as consultant for local and multilateral funders and clients
- Created first list of priority diseases for guaranteed coverage by the Philippine Health Insurance Corporation (PhilHealth); presented findings approved by PhilHealth Board of Directors; Project Lead was awarded the 2016 Roux Prize and \$100k
- Led three-person team to create budget impact assessment models for PhilHealth, covering 31 candidate treatment packages
- Evaluated a \$1.5M Department of Health-funded nationwide health leadership training program for public officials. Recommended process improvements based on primary research showing no significant effect on health outcomes
- Uncovered large-scale negligence in nationwide health data, as manager of primary data collection for 196 municipalities; Synthesized reasons for missing data, and presented recommendations to lift 70% missing data rate
- Managed eight-person team and 14 lecturers to execute training modules for 37 Department of Health researchers; program achieved 92% overall rating and is being replicated for the Food and Drug Administration
- Mentored and supervised summer interns to write and submit an unsolicited research proposal which won ~\$42k in funding

ENERGY DEVELOPMENT CORPORATION

Pasig City, Philippines

EDC is the world's largest vertically integrated geothermal energy company, with 1,458MW of installed capacity, \$2.3B in market capitalization and \$712M in revenues in 2015

2013-2015

International Business Development Analyst

- Won \$18M in project funding from a multilateral lender by modeling returns of EDC's first international geothermal project in Latin America; financial model was presented to senior leadership resulting in approval for \$30M drilling phase
- Led international cross-functional team composed of members from EDC Chile, EDC Philippines, and Alterra Power Corp. for the first conversion of an EDC site in Chile from exploration to exploitation status
- Conducted financial analysis and historical transaction benchmarking during due diligence for \$3M acquisition of Hot Rock Limited's geothermal sites in Chile and Peru
- Managed annual budgets and cash flows to EDC Chile for operational and capital expenses; worked with treasury department to minimize negative carry from over \$5M in yearly transfers
- Optimized internal approval limits for Chilean and Peruvian subsidiaries; collaborated with local counsel for documentation

HEALTH SCIENCES SOCIETY

Quezon City, Philippines

Vice President for Community Formation

2012-2013

- Oversaw execution of 12 community-building events for Health Sciences majors throughout the school year
- Developed and implemented first freshman orientation and mentoring program exclusively for Health Sciences majors

ADDITIONAL INFORMATION

- **Community:** Volunteer – New Faith Family Children's Home, Weekly Hospital Visit Leader – Kythe Ateneo (2009-2011)
- **Languages:** Native speaker of Filipino
- **Technical Skills:** Bloomberg, JMP
- **Interests:** basketball, cooking, mixed martial arts, podcasts (Radiolab, Planet Money, On Being, etc.)

YAN ZHOU

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EDUCATION

THE WHARTON SCHOOL, UNIVERSITY OF PENNSYLVANIA

Philadelphia, PA

Master of Business Administration Candidate; Major in Health Care Management

2016-2018

- Kaiser Family Foundation Fellowship recipient
- Wharton Health Care Club – VP of Finance, Health Care Business Conference – Content team, Global Health Volunteers
- Wharton Consulting Club, Penn Biotech Group – consulting project with a team of six students across Penn schools

RICE UNIVERSITY

Houston, TX

Bachelor of Arts in Computational and Applied Mathematics and Bachelor of Arts in Economics

2007-2011

- President's Honor Roll – Fall 2008, Fall 2009, GPA: 3.85/4.00, *cum laude*
- Selected as the Academic Fellow for 1st and 2nd year students and student career advisor for the Career Office
- Treasurer for the Business Club and Editor-in-Chief for the Investment Club journal

EXPERIENCE

GE CAPITAL

Norwalk, CT

Risk Analyst – Economic Capital Analysis and Adequacy

2014-2016

- Led and simplified the quarterly capital adequacy assessment process across all businesses to reduce time spent from 1.5 months to 3 weeks, saving ~100 hours across 8 teams
- Developed comprehensive management risk report for the establishing of risk reporting framework by prospecting data dimensions and automating data feed to risk report with SAS for ~\$480B GE Capital portfolio
- Performed outcome analysis on 1.8M transactions to identify key drivers of capital changes as part of Economic Capital simulation model transition
- Created multi-year capital forecast as company shrunk and identified areas of opportunity to ensure positive capital surplus
- Proposed and communicated audit findings and adjustment of \$2M in revenue to senior management on the equity revenue recognition process in the real estate financing business
- Delivered quality and timely results with expanded responsibilities amidst staff shortage and received GE Above & Beyond award for expertise and inclusiveness

GE HEALTHCARE

WI/ UT/ IL

Financial Management Leadership Program

2012-2014

Financial Management Program Intern

2010

- Selected as top 10% of applicants for the two-year rotational leadership program with focus on FP&A, Corporate Strategy, Operational Efficiency, and Controllershship combined with demanding coursework taught by senior professionals
- Top 5% of class in terms of performance rating and classes and recipient of “Outstanding FMP” Award at graduation selected by the program executive committee
- Managed sales to margin financials for 3 Healthcare IT products with \$40M quarterly revenue, including short- and long-term forecasts, risk and opportunity tracking, deal pricing support, and quarter close CFO reviews
- Simplified key HQ qtr close process by 2 hrs daily with revamped templates and improved data visibility for CFO decisions
- Identified and corrected \$1.5M of part costing issues for 2 cardiology products and resulted in margin increase of ~80bps
- Initiated and implemented the global demo inventory obsolescence tracker for Surgery products by working with 6 different regional finance and operation managers and resulted in 30bps of margin improvement through cost savings

PRUDENTIAL FINANCIAL

Newark, NJ

Fixed Income Management Intern

2009

- Performed transaction reconciliation and failed transaction settlement to the custodial banks for 30 client accounts daily

ADDITIONAL INFORMATION

- **GE Healthcare United Way campaign auction night organizer** – planned and executed an Auction Night event with silent and live auctions to raise ~10k of funds
- **Junior Achievement volunteer day organizer** – organized and led 30 volunteers to teach elementary school students
- **Alternative Spring Break** - Fundraised travel and living expenses in college to volunteer in an underperforming Charlotte NC middle school as a teacher
- **Languages:** Native speaker of Mandarin Chinese