



## **Jerome Sullivan, CFA**

### **Qualifications Summary**

Jerry is an optimistic and experienced finance professional with industry experience in real estate, non-profit management, financial services, and investment banking. He is dedicated to ensuring the long-term financial health of small to mid-size organizations through supporting revenue diversification and stability through rigorous analysis. An additional focus throughout his career has been embracing technology to ensure operational efficiency and move to a continual process improvement for financial transactions.

### **Professional History**

CFO Selections	Consultant	2024 – Present
Castle Island Group, LLC	Consultant	2020 – 2024
Hacienda CDC	Chief Financial Officer	2022 – 2023
Churchill Stateside Group, LLC	Chief Financial Officer	2013 – 2020
Cinnaire Corporation	Senior Vice President	2005 – 2013
Capital Fund Services, Inc.	President	2007 – 2013
Enterprise CDC Inc	Vice President	2002 – 2005
Wespath Benefits and Investments	Manager of Alternative Investments	1992 – 2002

### **Accomplishments**

- Raised debt and equity for real estate transactions totaling over \$1billion in value.
- Arranged bank financing and led negotiations for buyout of majority ownership and transfer of control to operating managers.
- Developed new investment model and raised funding to diversify development company into new markets and product lines.
- Extensive experience in representing nonprofits and developers with governmental entities to including presenting projects and investment opportunities, brokering agreements, and negotiating economic development incentives.
- Support of board and organization leadership through the development and implementation of budgeting and capital planning tools.
- Analyzing operations to identify key performance indicators and operational metrics in support of organizational goals and strategic plan.
- Assumed CFO responsibilities for organization severely affected from dismissal of previous CFO and Controller, and corrected reporting to ensure compliance with banking covenants.

### **Licenses / Education**

- Master of Science in Finance – DePaul University
- Bachelor of Science in Accounting with a major in Economics – University of Illinois
- CFA Charterholder