

MARC KELLY, MBA



QUALIFICATIONS SUMMARY

Marc Kelly is a trusted advisor providing private client counsel with a strong financial foundation. He has extensive experience with medical device, biotherapeutic, software, healthcare IT and business service companies ranging from start-ups to mid-market companies. Marc is known for providing Directors and Executive teams with competent, candid and forward-looking advice resulting in better decision making and profitable outcomes.

PROFESSIONAL HISTORY

CFO Selections	Consultant	2025 – Present
Innovative Financial Consultants	Trusted Advisor & Fractional CFO	2000 – 2025
Spectrum Asset Management	Co-Founder, CEO & Current Director	1987 – Present
Argus Investment Management	Vice President & Dir. of Marketing	1985 – 1987
Stein, Roe & Farnham	Associate & Portfolio Manager	1982 – 1985

ACCOMPLISHMENTS

- Raised over \$80 Million in private equity and debt capital for private client companies.
- Worked with 35 startups developing strategy, securing funding and managing growth resulting in 2 successful exits to date.
- 18 years managing equity and debt portfolios as an SEC Registered Investment Advisor.
- Co-founded Spectrum Asset Mgt. (a \$600 Million AUM) RIA.
- Raised over \$150 Million in privately managed investment advisory assets as principal.
- Served twice as president of Harvard Business School Alumni of Orange County.
- Tripled attendance as five-time Chair for annual HBSAOC Entrepreneurs Conference.
- Visiting Lecturer at the University of Nevada Reno teaching Entrepreneurial Finance.
- Member of Incline Village General Improvement District (IVGID) Audit Committee.

LICENSES & EDUCATION

- MBA Harvard Business School with emphasis in Finance and Service Operations
- BA University of Southern California (cum laude) as 4-year Trustee Scholar