

BARRY SAMPLE, MBA

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FINANCIAL ANALYST & MANAGEMENT ▪ INVESTMENT MANAGEMENT ▪ DIRECTOR OF RESEARCH

Financial Management specialist with MBA from Wharton School (University of Pennsylvania) known for expertise in local and global assets and investment management. Highly knowledgeable in Southeast Asian financials. Insightful financial leader seeing big picture in guiding proactive process improvements that gain efficiency and grow revenue. Actively leads and engages committees to plan and develop annual budgets, financial forecasts, and strategic planning. Adopt activist investment strategies structuring investment transactions, securitizations, sourcing, evaluation, development of investment memoranda, negotiation, execution, portfolio management, and performance reporting. Expert international relationship-building strategies. Entrepreneurial expert with history of successful global business operations.

CORE COMPETENCIES

Financial Management | Business Development | Presentations | Research Report Writing | Multi-Disciplinary Management | Capital Markets/Investments | KPI | Strategic Planning | Training/Education | Financial Publication Writing | Committee Leadership | Legal Structuring | Government Regulations | Investment Banking | Proforma Development | Project Management | Financial Forecasting | Portfolio Management | Performance Reporting | Investment Memoranda | Global Venture Capital Community | Operational Guidance

CAREER HIGHLIGHTS

- Drove revenue to \$2M-\$5M yearly by negotiating and finalizing financial transactions for asset classes: commercial real estate, bank balance sheet CLOs, and consumer finance.
- Pioneered new company (Golden Light Investment Trading Co. LTD) with 40 staff earning \$1M yearly revenue.
- Engaged Kingsmead Asset Management Investment Committee in macro analysis and top-down investment strategies.
- Analyzed and restructured investment strategies to fund management services in Vietnam, Asia, and other international locations.
- Founded and managed two entrepreneur business ventures with annual budgets over \$3M.

PROFESSIONAL EXPERIENCE

SAMPLE COMPANY | Houston, TX

Chief Strategist & Head of Investor Relationships, Americas | 2018–Present

Oversee investments and public equities in Vietnam for U.S. investors in boutique fund management services.

- Create and facilitate speaking engagements with clients to promote and guide Vietnamese investment opportunities.
- Compose and document fund marketing content in monthly and quarterly newsletters.

SAMPLE COMPANY | Ho Chi Minh City, Vietnam

Director, Head of Research | 2015–2018

Championed operations and management of 20 research analysts for Vietnam Securities ranking as country's Top Institutional Broker.

- Led research and marketing economic services for 60+ companies.
- Restructured training program for research analysts to deliver clear and concise financial grounding recommendations resulting in reduced staff turnover.
- Delivered updated macro and top-down market strategies.
- Researched and evaluated KPI and performance outcomes across interdisciplinary departments.

SAMPLE COMPANY | Ho Chi Minh City, Vietnam

Managing Director, Head of Research | 2011–2015

Established Vietnam securities company's research department from inception to daily operations. Investigated optimal structure and authored business plan including team structure, coverage list, and operations methodology for team of 24 analysts and support staff. Promoted from Head of Structured Products to Head of Research/Managing Director.

- Motivated functional analyst expert teams. Developed quality improvement training curriculum to improve analyst's writing.
- Helmed performance improvement coaching, initiatives, and standards. Tracked performance outcomes, reviewed and edited program reports.
- Oversaw planning, implementing, and managing all financial-related activities including presentation of market and sector forecasts for brokerage and investment banking customers.

SAMPLE COMPANY | Singapore
Securitized Products Group, VP for SE Asian Origination & Structuring | 2004–2008

Sourced new clients and improved relationships for multiple locations including Singapore, Malaysia, Thailand, and Vietnam. Partnered across interdisciplinary departments to execute deal structures for swaps and credit derivatives.

- Reviewed and negotiated deal transactions and legal documentation for execution teams.

SAMPLE COMPANY | Kuala Lumpur, Malaysia
Senior Vice President and Head of Asset Backed Securitization Group | 2002–2004

Established leadership assets and securitization services which included Malaysia's first auto loan securitization.

- Introduced structure and standards in ABS for Malaysian clients.
- Influenced securitization laws as member of Securities Commission Advisory Committee.

SAMPLE COMPANY | Hong Kong/Singapore & Chicago, IL
Asian Asset Securitization Group, Vice President & Global Asset Backed Securitization Group, Associate Director | 1996–2001

Oversaw, influenced, and compiled securitization transitions for Southeast Asia.

- Prepared, negotiated, and finalized financial reporting structures, materials, and documentation to credit approval committees and government regulators.
- Tracked and completed cash-flow modeling, legal structuring, and agency ratings.
- Contributed to company governance and execution of marketing and origination of U.S. securitization transactions.
- Prioritized asset-backed commercial paper market and ABS bonds for auto loans/leases, equipment leases, trade receivables, CMBS, and credit cards.

ENTREPRENEURIAL EXPERIENCE

CEO and Founder | **SAMPLE COMPANY LIMITED** | Ho Chi Minh City, Vietnam | 2010–2018

Initiated and founded six retail fashion stores selling Mariposa brand items for women.

- Managed store operations earning \$1M in revenue with staff of 40.
- Researched and evaluated KPI focusing on balanced growth, product quality, and customer service.

Director and Co-Founder | **SAMPLE COMPANY** | Ho Chi Minh City, Vietnam | 2008–Present

Lead all aspects of operations for primary forklift equipment company located in southern Vietnam.

- Manage \$2M annual budget rental agreements for fleet of 300+ trucks.

EDUCATION

Master of Business Administration, Finance | WHARTON SCHOOL UNIVERSITY OF PENNSYLVANIA | Philadelphia, PA

Bachelor of Science, Business Administration/Finance, (Cum Laude) | MIAMI UNIVERSITY | Miami, FL

Executive Education Course: **Real Estate Investment and Development (2019)** | RICE UNIVERSITY | Houston, TX