

Christopher J. Jackson
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EDUCATION

AACSB Bridge Program Graduate

New York, NY

Training in Best Practices for Business School Professors

June 2018

- Association to Advance Collegiate Schools of Business
- Helps executives from the corporate world transition to a business school teaching career
- 90% of ranked business schools hold AACSB Accreditation and 95% of the chief executives on the Financial Times FT500 attended an AACSB accredited school
- The AACSB has accredited 816 Schools of Business at universities and colleges in 53 different countries serving 3 million plus enrolled students

Northwestern University, Kellogg School of Management

Chicago, IL

MBA: The Managers Program

August 2007

- Concentrations: Marketing, Strategy & Management and Entrepreneurship

University of Notre Dame

Notre Dame, IN

Bachelor of Business Administration

May 2002

- Double Major in Accounting and Computer Applications - Graduated Cum Laude
- Graduated with 150+ Credit Hours in four years

EXPERIENCE

Kinsale Capital Partners, LLC

Chicago, IL

Managing Director

12/17 – Present

- Responsible for deal and investment flow across various industries
- Provide strategic planning and management to investments from start up to middle market stage
- Work with a portfolio of domestic and international partners and businesses
- Help organizations scale through hiring recommendations and systems recommendations and implementations
- Consult in advisory or executive roles as necessary
- Use experience to connect pertinent vendors to relevant organizations to spur growth
- Complete market and competitor analysis to give insights to companies
- Prepare organizations for exit opportunities
- Raise funds and aid in creating pools of investment capital for businesses to expand to the next level

Jackson Consulting

Oswego, IL

Consulting CEO/CFO/COO

1/09 – Present

- Work with various stage and size organizations (start up through mature) to provide executive leadership, strategy, direction and vision
- Frequently brought in by private equity and other investor groups to bridge the gap after investment
- Help grow businesses to prepare for successful exits, aid in building teams, processes and controls, provide insights to executive teams and boards, add structure and useful financial planning, reporting and analysis, successfully connect and create understanding between front end revenue generators and back end operational individuals
- Experience in multitudinous industries including construction, manufacturing, healthcare technology, real estate, recruiting, PE held and VC backed middle market companies, recruiting firms, general technology firms, etc.
- Onsite and remotely, build monthly reporting packages, budgets, perform system reviews, aid in finding permanent executives, assess people and processes

Ahead, LLC

Chicago, IL

- Responsible for leading the finance, accounting, sales operations, logistics, procurement & operations departments of \$300M plus, 150 plus employee privately held technology and consulting company started in 2007 that was number 5 on Crain's Fastest Growing Companies in Chicago as of 2013 and number 17 in 2014
- Play lead role in guiding company through due diligence and investment banking (William Blair) process that culminated with successful nine figure transaction (8x EBITDA) with multibillion dollar New York private equity firm, Court Square Capital Partners in November 2015
- Manage a team of almost 30 individuals
- Help lead all transaction, advisory, mergers and acquisitions activity within the company
- Report directly to the CEO/Founder and inherit the majority of the responsibilities of the COO/Co-Founder upon his departure in 2013
- Create weekly trackers, monthly and quarterly reporting and Board Reports and present trends and analysis
- Implement new cloud accounting system, Intacct, and transition off QuickBooks and spreadsheets
- Implement new expense tracking system, Concurforce
- Aid in implementing new commission tracking system, Xactly
- Oversee and approve 1,000 plus deals annually from booking to cash with responsibility to maintain terms and margin targets
- Implement automated processes and controls in the CRM Salesforce and Intacct Accounting systems
- Create process manuals for various job functions on team
- Hire top talent to build out teams to handle increased workloads and ramp twenty plus individuals
- Manage the compensation plan for all sales reps and executives
- Create for first time, prepare and manage the full company budget and forecasts with direct responsibility for my departments and all operating & G&A expenses; this expense management led to a one-year increase in EBITDA of over 100%
- Help maximize and track the amount of return through COOP, MDF and Rebate programs of our vendor partners – EMC, Cisco, VCE, VMware, etc.
- Create automated dashboards for real time and instant access to financial data for executives, finance, collections and reps
- Improve DSO, DDSO and Working Capital through process improvement, people management and systems automation
- Create a positive working environment where my team feels valued, receives solid training and guidance and enjoys coming to work daily
- Oversee complicated WIP revenue recognition for software, maintenance and consulting sales
- Perform due diligence on acquisition targets and extensive strategic analysis with executive team
- Sit in weekly five-person executive leadership team meetings and quarterly Board Meetings to drive company's direction
- Perform geographic and competitive research and benchmarking to determine which markets to enter and when and decide when to close branches down
- Proactively manage 2013 expenses in a manner that enabled us to hit our \$8M net income target despite having to close our CA region after four months
- Help educate executive team on financial acumen
- Consistently maintain 90 percent plus of AR in current or 1-30
- Enable company growth by negotiating bank line with various leading banking institutions, selecting best offer and achieving 6x the capacity we originally had with our third-party flooring capital line
- Improve standards of GAAP reporting and historical accuracy to pass over 10 audits per year related to bank financing, third party (BDO), technology (BDO) and sales taxes
- Structure international deals and VAT situations as efficiently as possible
- Develop credit check process and automate through Forseva, D&B and Salesforce
- Develop a robust Strengths & Weaknesses report to dive deep into the current state of affairs at Ahead
- Work my connection network to provide leads and introductions at customers for reps and sales management as requested
- Work with Finance Director to help facilitate tax reporting and structure third party lease deals

- Receive the Rookie of the Year Award in my first year at the company and have my compensation increased by 50% in less than two years based on merit and performance

Soverain Software, LLC

Chicago, IL

Director, Licensing & Assistant Controller

7/09 – 4/12

- Manage all financial and operational activities for a software licensing, development and patent company
- Create financial reports, procedures and analyses as company had no financial leadership for previous six years
- Set up and reconcile six years worth of financial data on online accounting software
- Perform due diligence, strategy and negotiations on multiple license deals with diversely sized companies totaling almost \$11 million dollars in revenue for Soverain
- Perform in depth analyses of various potential licensees that delve into company financials, operations and history through extensive research of SEC documentation, news reports and other sources
- Report directly to CEO and serve as lead for many of her ad hoc and special projects
- Present financial analyses and reports to outside stakeholders, including CEO of PE firm in New York
- Create a structured licensing process that incorporates a request list to the potential licensee and analysis of similar financial variables across the licensees that I established for the company
- Partake in licensing and negotiation conversations with high level executives of potential licensee companies, including several Fortune 500 companies, along with CEO
- Direct and drive company's licensing program
- Manage monthly accounting operations, including General Ledger, A/R, A/P, payroll, cash flow, forecasts, plan, P&L, balance sheets and bank reconciliations for consolidated company and various business divisions
- Create monthly close process and projections packages
- Manage tax filings for the company on a federal and state level
- Create models for various types of forecasting for the company related to internal functions and licensing
- Research potential acquisitions for the company and perform due diligence
- Serve as Network Administrator for Chicago office and assist CTO with ad hoc technology research and projects

Cardinal Growth Private Equity

Chicago, IL

Assistant Controller

1/08 – 7/09

- Prepare and review monthly partnership schedules/financial statements
- Prepare and maintain monthly performance data for fund companies, investment funds and corporate
- Represent the firm with investors, external accountants, lawyers, service providers and portfolio companies
- Engage in strategy sessions with chief executives of portfolio companies and help assess performance
- Manage all financial operations, statements, entries and intercompany activity for twenty plus entities
- Lead, coordinate and supervise audits (third party audits, SBA audits, etc.)
- Review and approve reports for investment funds
- Author and edit investor communications
- Help in constructing portfolio company valuations (waterfall analysis, market condition analysis, etc.)
- Manage corporate spending through implementing corporate card and expense reimbursement policies
- Improve bill payments through implementation of online automatic payments and scheduling
- Manage A/R, A/P and bank reconciliations for all entities
- Calculate management fees and administrative fees
- Interact with the SBA and work with various aspects of SBIC licensing, monitoring and application
- Work with third parties on preparation of tax returns for various entities
- Analyze new issue income, trial balances and financial statements for several fund companies
- Oversee cash management and help produce detailed cash report
- Conduct check and wire distributions to investors and employees
- Provide analytical financial support to deal team when they consider new deals
- Manage the ADP payroll process and expense reimbursement process for all employees
- Manage the Fidelity 401k process for all employees
- Serve as IT Network Administrator – server and user troubleshooting, maintenance and purchases
- Manage firewall, spam and all email traffic through iPrism and Protect Point
- Serve as Blackberry Administrator – manage devices, Add2Exchange and BB server and oversee purchases
- Serve as Telecommunications Administrator – IP phone troubleshooting, maintenance and purchases
- Serve as the HR Representative and Health Plan Administrator for Blue Cross Blue Shield of IL plan

- Manage online investor data room – IntraLinks
- Act as project manager and adapt quickly to various, diverse tasks as they arise
- Act as representative to various banks for account openings, account management and signature authority
- Interview and provide input relative to potential new hires
- Work as intermediary to get new CFO and Managing Director of Operations up to speed on all items
- Identify issues with historical tasks performed at company and correct as necessary
- Support Controller and General Partners in all functions

Data Return, LLC/Terremark Worldwide

Lisle, IL

Accounting Supervisor

1/07 – 1/08

- Work closely with CFO and Controller to maintain company's accounting/financial reporting functions
- Manage and coordinate the monthly close process – close books in five working days
- Oversee expense process to ensure appropriate recognition and timely accruals
- Prepare monthly financial reports for CFO, BOD, outside PE firm and managers in operations, marketing, R&D and G&A
- Support financial process development and financial requests of managers throughout company
- Manage fixed assets, reclasses, prepaids, allocations, 401k match, expenses, billables, reconciliations, accrued expenses, business metrics and capitalized expenses
- Prepare schedules for audits and work closely with auditors in the execution of all audits
- Prepare the monthly P&L and run other financial reports out of Great Plains and FrX reporting software
- Perform several special projects as requested, normally involving the analysis of data pulled through Access
- Hold monthly conversations with various business segments to ensure proper expense reporting
- Perform budget vs. actual analysis and explain any variances or trends
- Document several procedures that are part of this job
- Aid extensively in the transition of the company, its financials and its systems after the purchase by Terremark from a PE firm
- Perform extensive purchase accounting and filings
- Oversee and guide two individuals that perform monthly tasks in the expense area
- Manage both UK and US operations simultaneously

K-Jax Management

River Forest, IL

Real Estate Property Manager and Owner

3/02 - 9/06

- Responsible for managing the marketing, advertising, financial operations, leasing of units, tenant requests/problems, taxes, insurance, and daily care for properties in River Forest

McDonald's Corporation

Oak Brook, IL

Financial Analyst/Corporate Controller Group

9/03 - 4/05

- Work with various groups related to McDonald's global business process, including Areas of the World, US, Debt, Treasury, Investor Relations, Legal and Head Management
- Analyze and prepare the consolidated balance sheet, income statement, equity statement, shares and stock information and statement of other operating and non-operating income/expense
- Analyze revenue and P&L on a monthly basis
- Coordinate earnings release schedules with Investor Relations
- Analyze trends, calculate minority interest, review share activity, analyze store count, review financial statements and prepare cash flow statements for McDonald's Partner Brands, including Boston Market, Chipotle and Pret A Manger
- Prepare the McDonald's 10Q and 10K and file both with the SEC
- Prepare various highlight reports and perform detailed research of diverse business activity for upper management
- Prepare reports for the Board of Directors
- Research technical accounting issues
- Participate in special projects depending upon need (secret shopper, competitor studies, taste panels, etc.)
- Provide assistance to group members as problems/projects arose (debt, treasury, cash flow management)

Deloitte & Touche

Chicago, IL

Enterprise Risk Services Consultant

7/02 - 9/03

Enterprise Risk Services Intern

6/01 - 8/01

- Work with a diverse group of audit teams and business clients across several industries to ensure proper financial and computer controls were in place relative to the financial statements
- Perform testing on various business cycles, system platforms, software packages, and financial applications, through multiple methods including client interviews
- Forecast, plan, price and improve processes for several smaller clients I handled independently
- Present various value-added and business improvement suggestions to the executive officers of several clients
- Execute on a daily basis individual audit-related and system-related assignments and tasks directed by higher management and relied upon when generating an overall audit opinion
- Thrive as a team member with great emphasis on communication and creation of high-level deliverables for the client and my superiors
- Contribute to internal control databases used to provide value to clients
- Manage several client engagements where I was responsible for planning work, budgeting hours, maintaining positive client relations, and meeting the client's expectations
- Research several clients along with their internal financial and computer controls to gain a better understanding and perform at a higher level
- Assist in recruiting future Deloitte & Touche employees by visiting universities, participating in firm sponsored recruiting events, and acting as an advisor to interns and new hires at the firm
- Captain Deloitte & Touche team members in various volunteer projects including Chicago Cares and Junior Diabetes Research Foundation
- Received several exceeding expectations evaluations from my superiors for past projects

EXTRA CURRICULAR

Chairman of the Board, Oswego YMCA of Metro Chicago

Amate House, Development Committee

Walk for the Cure for Breast Cancer

Adopt-A-Family Program

Walk for the Cure for Diabetes

Member of the Elks Club

ND Government: Athletics/Student Services

Rec Softball & Basketball Captain

Father of five

Wendy's High School Heisman National Finalist – 1998

Founder & Volunteer Coach – Coach Chris Basketball

Feed My Starving Children Volunteer

Holy Spirit Catholic Community Religious Ed Teacher

Regional Coordinator for Stanford University's OHS

Oswegoland Park District Volunteer Coach

Troop 4380 Girl Scouts Cookie Chair

Chicago Cares Team Captain

Junior Diabetes Fundraiser Captain

Studied in Galway, Ireland – 6 mos. in 2001

YMCA Boys & Girls Basketball Coach

ND Keough Hall Senator

Jackson Bros Charity Roundball Classic Founder

Smashed 12-inch Softball Captain

Married since 2002

Elementary School Tutor

Fundraising Chair – Plank Junior High

Holy Spirit Retreat Co-Leader

Hunt Club Elementary HSA Officer