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CORPORATE BUSINESS DEVELOPMENT / STRATEGIC PLANNING / FINANCIAL ANALYSIS Deal Structuring & Negotiations • Project Guidance • Due Diligence

SELECTED HIGHLIGHTS

- Promoted to Director of Corporate Strategy at Main Street America, use industry best practices and tailored investigation approaches as a key team player for due diligence and merger with American Family Insurance; guarantee strong attention to detail in supporting expected combined equity of \$9B+, constituting potential largest mass mutual merger in history
- Generated 10% premium growth in FY 2017 and produced numerous new product launches by spearheading a diverse cross-functional team tasked with strategy development, implementation, and monitoring
- Proven track record of reversing 5 years of premium decline and driving business into the top 10% through analysis and implementation of a creative state strategy as the project lead.
- Supported the introduction of \$3.5M in annual savings with a new interest rate and tax deductions via the issuance of \$70M in surplus notes to replace preferred shares
- Collaborated with hotel general managers to recognize \$1M+ in direct cost savings, 14% of total direct costs

CORE COMPETENCIES

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|--|---------------------------------|-----------------------|
| ▪ Corporate Business Development | ▪ Strategic Planning | ▪ Financial Analysis |
| ▪ Due Diligence | ▪ Deal Structuring/Negotiations | ▪ Reporting/Metrics |
| ▪ Team Building/Leadership | ▪ Process Improvement | ▪ Business Proposals |
| ▪ Technology & Competition Assessments | ▪ Stakeholder Management | ▪ Profit Optimization |

MAIN STREET AMERICA GROUP | JACKSONVILLE, FL | 2015 – PRESENT

Director, Corporate Strategy: 2018 – Present

Designated to lead the execution of mid-term plans and cross-functional strategic initiatives, aligning senior management and department leaders and therefore generating \$50.0M in year-over-year revenue within a competitive and dynamic market. Establish clear lines of communication with Senior Management team to ensure continuity of strategy development, harmonizing strategy creation and strategy implementation to optimize budgets and realize constant improvements to return on investment.

- Promoted to Director of Corporate Strategy, use industry best practices and tailored investigation approaches as a key team player for due diligence and merger with American Family Insurance; guarantee strong attention to detail in supporting expected combined equity of \$9B+, constituting potential largest mass mutual merger in history
- Orchestrated team to identify partners and execute sale of Great Lakes Casualty Insurance Company for \$15M to Enstar Group which is licensed in Michigan for non-standard auto; provided well-received recommendation on partner assessment and selection which was later adopted across all future corporate strategy initiatives
- Translate forward-looking environmental changes into meaningful impacts for revenues, establishing constructive relationships with executives to scenario plan and enable MSA to strengthen its leadership position; cited as essential in a 7% upturn in year-over-year revenue growth in personal lines
- Led the search, testing, and management of innovative business enhancements for bridging existing gaps and achieving objectives; spearheaded bonds western expansion initiative, which reduced exposure to the line of business by 8% and subsequently increased average investment profitability by 7%
- Partner with department leaders to identify next generation of opportunities for operational excellence, helping teams to analyze and capitalize on crucial opportunities, including an overhaul to project management efforts to reduce budget variances

Finance Director – Enterprise Performance: 2015 – 2018

Develop and launch the department responsible for tracking and overseeing monthly operating reviews, quarterly progress reports, and board reporting, driving performance improvements. Provide comprehensive support to executive management regarding profit and cost reporting, analysis, tracking and productivity across the enterprise. Establish and implement a critical Enterprise Risk Management (ERM) program to quantify risk appetite and manage and mitigate financial, strategic and operational risk, reducing risk by 2%. Devise and introduce a detailed model for peer group comparisons on a quarterly basis including improvement observations and commentary on relative performance, increasing productivity.

- Partnered with senior management to develop yearly budgets and quarterly forecasts for the organization's \$1B premium plan and \$200M operating budget spearheading initiatives saved 2% annually
- Co-led a diverse cross-functional team of 15 delivering growth from strategy development to implementation and monitoring, resulting in a number of new product launches and 10% premium growth in FY 2017
- Appointed as the project lead to analyze and implement an innovative state strategy to drive business into the top 10% while reversing 5 years of premium decline
- Functioned as the team leader for the issuance of \$70M in surplus notes to replace preferred shares leading to \$3.5M in annual savings with a new interest rate and tax deductions

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MAIN STREET AMERICA GROUP ACHIEVEMENTS, CONTINUED

- Selected for a newly created strategic role to advise on initiatives affecting national positioning and resource allocations for long-term product rollouts
- Significantly enhanced key models monitoring competitor groups and benchmarks by state and line of business to provide insight into market share, correlations and production trends, identifying 3 areas of further opportunity.
- Created crucial dashboards to monitor all major strategic company initiatives including automating a certain process to eliminate 8-10 work-hours per month for reporting purposes
- Built and maintained lasting relationships with rating agencies including AM Best to maintain an “A” (Excellent) rating illustrating the ability to meet ongoing financial obligations and enabling the company to issue long/short-term debt

ASUTOSH GROUP | JACKSONVILLE, FL | 2006 – 2015

Finance Vice President: 2010 – 2015

Finance Manager: 2006 – 2010

Oversaw all aspects of the annual operating plan process, quarterly forecast, and monthly variance analysis while also developing the annual operating plan and re-forecast for the 6-12 hotels and presenting to the management group. Ensured the availability of value-added financial information for decision making while providing strategic direction to the company’s business model. Prepared and analyzed proformas for new investments including revenue and expense projections, insurance/tax structure and ROI, IRR, NPV, cash return metrics and payback period calculations.

- Promoted to collaborate with executive leaders to advance operational directives and financial controls, reducing expenses 3%
- Prepared quarterly presentations highlighting performance, outlook and key KPI’s, determining 3 areas for improvement
- Conducted timely reviews of operating performance to evaluate business risks and opportunities for each reporting cycle, generating increased revenues
- Developed/monitored KPIs against performance, highlighting trends and analyzing causes of unexpected variance
- Identified \$1M+ of direct cost savings (14% of total direct costs) with the assistance of the hotel general managers
- Spearheaded and developed the FP&A/Finance Department providing strategic financial oversight and leadership by coordinating with the executive management team to establish long-range goals, strategies, plans, and policies
- Directed and conducted extensive sensitivity analyses on financial forecasts to identify and quantify risks/opportunities and recommend solutions to ensure on-budget performance
- Created a five-year financial model to support long-term strategic planning and capital raising activities

JOHNSON & JOHNSON | FL AND NJ | 2004 – 2006

Senior Financial Analyst

Supported Global Marketing, HQ Finance, and IM/USROTC organizations with all financial responsibilities including accounting, forecasting, budget vs. actual analysis, financial updates and month-end closing assignments while establishing and introducing annual business plans in excess of \$200M. Conducted sensitivity analysis on price increases for certain Vistakon Pharmaceuticals drugs price. Coordinated with IT and AP groups to develop a report displaying all activities by third party vendors.

- Created a financial model used in quarterly review presentations for upper management incorporating actual data versus multiple forecasts to better understand cost drivers and trends, reducing costs by 2%
- Developed methods to track operating savings and balance sheet benefits, increasing profits by 1%
- Collaborated with the UK-based International Treasury group to understand reporting requirements and reconciliation procedures for the repatriation of \$1B cash onto the balance sheet
- Developed key procedures regarding the appropriate accounting treatments for the non-commercial branch office located in Belgium to accurately reflect the expense and assets/liabilities on corporate financial statements
- Automated the entry of international dividends into the foreign tax credit system by collaborating with tax and treasury groups

EDUCATION

Jacksonville University, Jacksonville, FL- *Master of Business Administration (GPA: 3.83)*

University of Florida, Gainesville, FL - *Bachelor of Science in Business Administration – Finance*

ADDITIONAL CREDENTIALS

TECHNICAL SKILLS	Microsoft Office: Word, Excel, PowerPoint, Outlook, Access, Publisher; Microsoft Visio, Microsoft SharePoint, Cognos, TM1, SAP, Peoplesoft, Sage
CERTIFICATIONS	Certified Hotel Administrator
ORGANIZATIONS	Member, Leadership Jacksonville, Jacksonville, FL: 2016 – Present Board Member, Gabriel House of Care, Jacksonville, FL: 2015 – Present Member, Financial Executives International, North FL Chapter: 2014 – Present