

JONATHAN FICHMAN

Fort Lauderdale, FL

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GLOBAL FINANCE EXECUTIVE

Inspire Creative Thinking to Help Organizations Monetize Data, Leverage Strategy & Thrive

A Global Finance Executive with over 20 years of domestic and international experience in Fortune 100 corporations and small companies. Proven success in multiple sectors: in Wall Street, wealth management, banking, consulting, FinTech, government, and non-profits. Track record of growing the bottom line while spearheading operational improvements. Expertise in linking technology to business operations for seamless product usage. Entrepreneur in Residence and MIT trained mentor to several large universities and accelerators.

**P&L Management | Policy & Design Implementation | Financial & Data Analysis | Consulting
Risk & Compliance Admin | Project & Change Management | Product Marketing | Coaching | Board Member**

– PROFESSIONAL EXPERIENCE –

C-Anax Ventures and Advisory Fort Lauderdale, FL 2013 – Present

Providing custom solutions for tactical execution of business strategies.

Founder

Provide mentoring / consulting on operational, financial and marketing best practices for tactical turnaround & growth.

- Mentored a company from a business idea to achieving over \$20 million in yearly sales.
- Helped grow another company from a business idea in sales to over \$4 million in yearly sales.
- Constructed great strategic financial models to provide solid foundations for management decisions, business growth and growth/investments.
- Led companies in diverse industries to over 20% growth
- Secured funds for capital-raising.

Florida International University Miami, FL 2017 – Present

Among the top 10 largest universities in the United States.

Adjunct Professor

Teach a senior level International Management course; sixth ranked International Management program in the country.

- Linked real-world business experience to academic theory by not only teaching, but also mentoring students.
- Coached student team to first place win amongst hundreds of teams in an international business simulation game.

Bank of America Merrill Lynch (NYSE: BAC) Fort Lauderdale, FL 2005 – 2015

Global financial institution with over 300K employees worldwide.

Senior Vice President Strategy & Execution – International Wealth & Investment Management (2010 – 2015)

Responsible for operations throughout Europe, Asia and Latin America.

- Co-managed \$100 million budget for sales & day-to-day international operations of 1600 persons.
- Created a new online lending international wealth management product, increasing division revenue by over \$1 million.
- Ensured compliance with domestic and international regulations governing antitrust and risk management processes.
- Successfully divested International wealth management division to Julius Baer, a Switzerland based company.
- Managed complex international Finance Analyst compensation packages.
- Implemented common working practices across the organization to improve processes and communication among internal business partners.

Senior Vice President - International Wealth & Investment Management, Australia & China (2010)

Provided tactical strategic leadership to very large project teams located in Japan, UK, Australia, US and Singapore.

- Set up Australian fixed income trading desk within a record breaking three months while living in Sydney, Australia.
- Established a Chinese banking charter while living in Shanghai.

Senior Vice President – US Trust (2007 – 2010)

Responsible for maintaining optimal performance amongst all Trust Officers.

- Successfully and efficiently integrated U.S. & international acquisitions (Merrill Lynch, US Trust & LaSalle) into corporate operations.
- Formed an India based client / employee US Trust support center.

Vice President – Corporate Business Banking (2005 – 2007)

Supported corporate leadership within all functional areas by leading both Six Sigma and non-Six Sigma based projects.

- Designed & led process management projects yielding millions of dollars in corporate savings & customer benefits.
- Established an India based center for financial modeling.
- Obtained Six Sigma Black Belt and Benchmarking Certifications

Cherry Hill Township

Cherry Hill, NJ

2003 – 2004

An affluent municipality of 100,000 people with an operational budget of approximately \$280 million.

Director of Operations, Procurement and Insurance - Reported to the Mayor

Managed operational, risk and purchasing activities with over \$100 million in P&L responsibility. Also, prepared reports that included departmental forecasts, expense reports, budget allotments, future usage models, procedural reports and risk analysis.

- Saved over \$500,000 in annualized costs through operational digitalization and process management.
- Published a state purchasing card manual that reduced operational costs.
- First in state to sell city seized assets over Internet resulting in auction fee cost savings of thousands of dollars.

Actrade Financial Technologies

New York, NY

1999 – 2003

A startup company - Trade finance, business-to-business payment tool, FinTech company. Firm sold to Siemens.

Vice President, Strategic Initiatives - Reported to the President and CEO

Managed a P&L of nearly \$5 million, spearheaded marketing activities for strategic corporate, banking, financial and technology partnerships and directed all investor relations activities.

- One the first ever online B2B payment companies.
- Developed million-dollar business relationships.
- Created an on-line short-term payment tool for business-to-business usage.
- Obtained multi-million-dollar credit facilities / investors & developed a web-based tool for short-term borrowing.
- Achieved over 100% growth per year for company's trade finance/supply chain product.

Carson Group

New York, NY

1997 – 1999

Wall Street Investor relations/ investment banking consulting company. Firm sold to Thomson Financial.

Senior Analyst - Reported to a senior partner

Wall Street Transportation Sector Analyst focusing on Fortune 50 transportation companies. Synthesized and assessed financial/industry data for investment banking and equity activities. Also, published daily, weekly and monthly data market reports on sector trading and competitor analysis utilized by senior executives and board members.

- Assisted in increased daily stock trading knowledge by accurately advising senior level corporate executives.
- Established key buy-side and sell-side relationships leading to great company coverage.
- Attracted new Fortune 100 transportation companies as clients.

– EDUCATION –

- **Master of Business Administration (MBA)** - University of Miami Business School, Coral Gables, FL
- **Bachelor of Arts (BS)** – George Washington University, Washington, DC

FICHMAN, JONATHAN
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Application		Comments
Status:	New	There are no items in this section.
Country:	United States	Correspondence
Attachments to be included in all Job Submissions:	Submission Attachments 0 attached	01/17/2019 People First Action: Email
Attachments Added After Submission	Submission Attachments 0 attached	Thank You for Your Interest in Job COMMISSIONER OF...
Vacancy Source:	Newspaper	Offer Letter
Relatives: To your knowledge, do you have any relatives working in this agency?	No	There are no items in this section.
Gender:	Male	Application Status Audit Trail
Race (Check only one):	White	01/17/2019 People First New
Ethnicity (Check only one):	Not Hispanic or Latino	Tags
Date of Birth:		There are no items in this section.
Right To First Interview	Not Applicable	More Information
	If you responded yes to the above statement, attach a copy of your official layoff letter when applying for this vacancy.	Alternate Phone Number: 13057339323
Veteran Status	None of the Above	*Mailing Address : 9324 NW 10th Street
ARE YOU CURRENTLY EMPLOYED WITH THE AGENCY TO WHICH YOU ARE CURRENTLY APPLYING?	No	*City Fort Lauderdale
HAVE YOU RECEIVED A PROMOTIONAL APPOINTMENT WITHIN THE CAREER SERVICE, SUBSEQUENT TO ACTIVE MILITARY SERVICE, WITH THE AGENCY TO WHICH YOU ARE APPLYING?	No	*State: Florida
People First Initial VP Review	No Selection	*ZIP Code: 33322
People First Eligible VP Category (if different)	No Selection	*Country United States
Agency Final VP Eligibility Review	No Selection	*Exemption from public record: Are you a current or former law enforcement officer, other covered employee** or the spouse or child of one, whose information is exempt from public records disclosure under Section 119.071(4)(d), Florida Statutes (F.S)?
Agency Final VP Category Determination	No Selection	No
		*Citizenship: The State of Florida hires only U.S. citizens and lawfully authorized alien workers. You will be required to provide identification and either proof of citizenship or

Background Information

A "yes" answer to these questions will not automatically bar you from employment. The nature, job-relatedness, severity, and date of the offense in relation to the position you are applying are considered. [see 112.011, F.S.]

Have you ever been convicted of a felony or a first degree misdemeanor ?

No

If yes, what were the charges ?

Where ? (City/State)

Date

Have you ever pled nolo contendere or guilty to a crime which is a felony or a first degree misdemeanor ?

No

If yes, what were the charges ?

Where ? (City/State)

Date

Have you ever had the adjudication of guilt withheld for a crime which is a felony or first degree misdemeanor ?

No

If yes, what were the charges ?

Where ? (City/State)

Date

Signature

I am aware that any omissions, falsifications, misstatements, or misrepresentations above may disqualify me for employment and, if I am hired, may be grounds for termination at a later date. I understand that any information I give may be investigated as allowed by law. I consent to the release of information about my ability, employment history, and fitness for employment by employers, schools, law enforcement

proof of authorization to work in the U.S. Are you a U.S. citizen or legally authorized to accept employment with the specific hiring authority to which you are applying?

***Selective Service: Section 110.1128, Florida Statutes, prohibits employment by the state (including re-hire after a break in service) of any male born on or after October 1, 1962, who failed to register with the Selective Service System, under the provisions of the U.S. Military Selective Service Act, during the person's period of eligibility (ages 18 through 25). Additionally, if currently employed by the state, this law prohibits the promotion of such person. You may be required to provide documentation. If you are a male born on or after October 1, 1962, have you registered with the Selective Service or do you have proof of an exemption from this requirement?**

Not Applicable

agencies, and other individuals and organizations to investigators, human resources staff, and other authorized employees of Florida state government for employment purposes. The consent shall continue to be effective during my employment if I am hired. I understand that applications submitted for state employment are public records. I certify to the best of my knowledge and belief all of the statements contained herein and on any attachments are true, correct, complete, and made in good faith.
If applicable, Complete Qualifying Questions prior to submitting your application.

By checking this box, I certify that I have read and agree with these statements	Yes
Interview Result	
overdueInterviews	

Screening Details

Are you legally authorized to work in the United States?	Yes
Will you now or in the future require sponsorship for employment visa status (e.g. H-1B visa status)?	No
Do you have five (5) or more years of responsible private sector experience working full-time in areas within the scope of the subject matter jurisdiction of the Office of Financial Regulation within the last ten (10) years?	Yes
If you answered "yes" to the previous question, please indicate the number of years of experience and elaborate in detail your experience. If no, please respond N/A.	I had worked for Merrill Lynch and part of my duties were regulatory items.
Do you have five (5) or more years of experience as a senior examiner or other senior employee of a state or federal agency having	No

regulatory responsibility over financial institutions, finance companies, or securities companies?	
If you answered "yes" to the previous question, please indicate the number of years of experience and elaborate in detail your experience. If no, please respond N/A.	na
Do you claim exemption from the public records law under the provision of the Florida Statutes 119.071(4)? If so, please provide exemption category.	no

Periods of Employment

*Name of Employer	C-Anax Ventures and Advisory
*Your Job Title	Founder
*Currently Employed	Yes
*Start Date	01/01/2013
*End Date	MM/DD/YYYY
*Hours Per Week	50
Employer's Address	9324 NW 10th Street
Supervisor's Name	
Supervisor's Phone Number	
*Duties and Responsibilities	Providing custom solutions for tactical execution of business strategies. Founder Provide mentoring / consulting on operational, financial and marketing best practices for tactical turnaround & growth. * Mentored a company from a business idea to achieving over \$20 million in yearly sales. * Helped grow another company from a business idea in sales to over \$4 million in yearly sales. * Constructed great strategic financial models to provide solid foundations for management decisions, business growth and growth/investments. * Led companies in diverse industries to over 20% growth * Secured funds for capital-raising.
*Reason For Leaving	na
Your name, if different during employment	
*Name of Employer	Florida International University

*Your Job Title	Adjunct Professor
*Currently Employed	Yes
*Start Date	01/01/2017
*End Date	MM/DD/YYYY
*Hours Per Week	50
Employer's Address	Miami, FL
Supervisor's Name	
Supervisor's Phone Number	
*Duties and Responsibilities	Among the top 10 largest universities in the United States. Adjunct Professor Teach a senior level International Management course; sixth ranked International Management program in the country. * Linked real-world business experience to academic theory by not only teaching, but also mentoring students. * Coached student team to first place win amongst hundreds of teams in an international business simulation game.
*Reason For Leaving	NA
Your name, if different during employment	

*Name of Employer	Bank of America Merrill Lynch (NYSE: BAC)
*Your Job Title	SVP
*Currently Employed	No
*Start Date	01/01/2005
*End Date	12/31/2015
*Hours Per Week	50
Employer's Address	Fort Lauderdale, FL
Supervisor's Name	
Supervisor's Phone Number	
*Duties and Responsibilities	Global financial institution with over 300K employees worldwide.
*Reason For Leaving	Division Sold
Your name, if different during employment	

*Name of Employer	Cherry Hill Township
*Your Job Title	Director of Operations, Procurement and Insurance
*Currently Employed	No
*Start Date	01/01/2003
*End Date	12/31/2004
*Hours Per Week	40

Employer's Address	Cherry Hill, NJ
Supervisor's Name	
Supervisor's Phone Number	
*Duties and Responsibilities	An affluent municipality of 100,000 people with an operational budget of approximately \$280 million. Director of Operations, Procurement and Insurance - Reported to the Mayor Managed operational, risk and purchasing activities with over \$100 million in P&L responsibility. Also, prepared reports that included departmental forecasts, expense reports, budget allotments, future usage models, procedural reports and risk analysis. * Saved over \$500,000 in annualized costs through operational digitalization and process management. * Published a state purchasing card manual that reduced operational costs. * First in state to sell city seized assets over Internet resulting in auction fee cost savings of thousands of dollars.
*Reason For Leaving	School
Your name, if different during employment	

*Name of Employer	Actrade Financial Technologies
*Your Job Title	Vice President, Strategic Initiatives
*Currently Employed	No
*Start Date	01/01/1999
*End Date	01/01/2003
*Hours Per Week	50
Employer's Address	New York, NY
Supervisor's Name	
Supervisor's Phone Number	

*Duties and Responsibilities	A startup company - Trade finance, business-to-business payment tool, FinTech company. Firm sold to Siemens. Vice President, Strategic Initiatives - Reported to the President and CEO Managed a P&L of nearly \$5 million, spearheaded marketing activities for strategic corporate, banking, financial and technology partnerships and directed all investor relations activities. * One the first ever online B2B payment companies. * Developed million-dollar business relationships. * Created an on-line short-term payment tool for business-to-business usage. * Obtained multi-million-dollar credit facilities / investors & developed a web-based tool for short-term borrowing. * Achieved over 100% growth per year for company's trade finance/supply chain product.
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*Reason For Leaving	Bankrupt
Your name, if different during employment	
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*Name of Employer	Carson Group
*Your Job Title	Senior Analyst
*Currently Employed	No
*Start Date	01/01/1997
*End Date	01/01/1999
*Hours Per Week	50
Employer's Address	New York, NY
Supervisor's Name	
Supervisor's Phone Number	
*Duties and Responsibilities	Wall Street Investor relations/ investment banking consulting company. Firm sold to Thomson Financial.
*Reason For Leaving	Another job
Your name, if different during employment	

Formal Education

*Name of School	University of Miami Business School
*Location	Coral Gables
*Start Date	08/09/2004
End Date	MM/DD/YYYY
Course of Study	Master of Business Administration (MBA)
*Degree Earned (transcripts may be required)	Masters
Credit Hours – Quarter	
Credit Hours – Semester	

*Name of School	George Washington University
*Location	Washington, DC
*Start Date	08/15/1994
End Date	MM/DD/YYYY
Course of Study	Bachelor of Arts (BS)
*Degree Earned (transcripts may be required)	Bachelors
Credit Hours – Quarter	
Credit Hours – Semester	

Language Skills

There are no items in this section.

License, Registration or Certification

There are no items in this section.

Job-Related Training or Course Work

There are no items in this section.

Knowledge, Skills and Abilities

There are no items in this section.
