

DAN POLLOCK, CFA, CPA

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EDUCATION

THE UNIVERSITY OF TEXAS AT AUSTIN, McCombs School of Business, Austin, TX **May 2018**

Master of Business Administration, Concentration in Finance and Strategy

- GPA: 3.96; Member of Graduate Finance Association and MBA Healthcare Association

ST. JOHN FISHER COLLEGE, Bittner School of Business, Rochester, NY **May 2009**

Bachelor of Science in Accounting

- GPA: 3.84; *Magna Cum Laude*
- NCAA Division III Football: Captain (2008)/Player (2005-2008); Academic All-American and Draddy Trophy semi-finalist

EXPERIENCE

MBA INVESTMENT FUND, LLC, Austin, TX **November 2016 – Present**

Portfolio Manager & Managing Director of Energy, Industrials, Materials, and Utilities Coverage Group

- One of sixteen students selected through a formal application and interview process to actively manage value and growth portfolios with approximately \$24M in AUM

DELOITTE & TOUCHE LLP, Chicago, IL and New York, NY **2010 – 2016**

Mergers & Acquisitions Transaction Services (MATS) – Manager (2013 – 2016)

- Advised on over 20 potential Healthcare and Life Sciences Industry transactions ranging in purchase price from \$20M to \$12B or greater by providing pre-acquisition financial and accounting due diligence services
- Nominated by audit partner to join MATS group through the firm's Management Development Program
- Analyzed company's financial information, key performance indicators and accounting policies to assess quality of earnings and normal working capital levels to assist clients comprehend how operating results impact their strategy
- Identified significant financial and operational trends and developed specific questions used to inquire of key members of management to further understand the quality of earnings and assets; and any impact to the transaction purchase price
- Directed global carve-out of pension and other employee benefit accounts for a Fortune 500 Life Sciences company, the largest carve-out project in the firm's history; created detailed balance sheet analytical tool that generated efficiencies for both the client and the internal project team shortening the time of completion for the carve-out
- Collaborated with up to five cross functional specialist teams during client engagements
- Supervised, managed and developed up to two junior team members during client engagements by reviewing completed tasks, providing performance feedback, and identifying key areas for development

Audit and Enterprise Risk Services – Senior Associate (2010 – 2013)

- Directed and completed audit engagements for one SEC registered public company including development of audit plan, assessment of internal controls effectiveness, and analytical/substantive audit procedures
- Prepared annual and quarterly public financial statement filings, working directly with the financial reporting department to identify emerging accounting matters that ensured accurate reporting and disclosures
- Performed testing procedures of fair value estimates for financial reporting purposes, including assessment of valuation methodologies and assumptions, development of independent valuations, and sensitivity analyses
- Coordinated and consolidated the work of other internal audit work streams, including valuation and tax specialists
- Developed a team of four junior members by demonstrating teamwork, integrity, and leadership, providing the team the necessary skills to take on additional responsibilities and tasks; all team members promoted internally

DERMODY, BURKE & BROWN, CPAS, LLC, Syracuse, NY **2009 – 2010**

Audit and Tax – Associate

- Prepared tax returns for corporations, partnerships and individuals; chosen by lead tax partner to research complex tax issues
- Performed over 15 attest engagements for corporations and partnerships including compilations, reviews and audits

ADDITIONAL

- Chartered Financial Analyst (CFA) and Certified Public Accountant (CPA), State of New York and Illinois
- Personal interests: Recreational powerlifting, hunting on family's ranch, Bass and Walleye fishing, and cooking
- **Work Eligibility:** Eligible to work in the United States with no restrictions