



KUMAR AMPAPATHINI

TECHCXO PARTNER - FINANCE & OPERATIONS



RELEVANT EXPERIENCE

Kumar Ampapathini is a TechCXO Partner and experienced finance and operations executive who serves clients as C-Suite / Board advisor and an interim and fractional CFO/COO in the New York metropolitan area. Among his key leadership roles, Kumar served as:

VP, Alliance Data Card Services – Alliance Data's (NYSE: ADS) Card Services business develops market-leading private label, co-brand and business credit card programs for many of the world's most recognizable brands. Kumar led Mergers & Acquisitions and played a critical role in business development to accelerate growth in key areas. During his time, he executed \$3B+ worth of deals.

Managing Director, Guggenheim Partners – Guggenheim Partners is a global investment and advisory firm with more than \$280 billion in assets under management. As Managing Director, Kumar was responsible for all aspects of strategic Financial Planning & Analysis, investment evaluation, compensation and headcount planning for hyper growth, expense management, Capital Analysis, and Regulatory / GAAP financials.

Executive Director – JPMorgan Chase & Co. – JPMorgan Chase is a leading global financial services firm with operations servicing clients in more than 100 countries. As Executive Director, Kumar led credit card partner deals, competitive strategy, supported Fed stress testing (CCAR), investor / board presentations, quarterly business reviews, and built teams across different geographic locations.

Finance Leader, Microsoft – As a finance leader in Microsoft, Kumar played an important role in long-range plan and strategic analysis to position Consumer & Online group for growth opportunities.

Kumar's career includes significant investment banking roles with **Citi** and **Merrill Lynch**. His career began as a technology leader with **Cisco**.

PERSONAL STATEMENT

Clients think of me as a key business partner who adds critical insight, analysis, and value to Board-level strategic decisions.

I also provide functional expertise to manage any and all financial and administrative aspects of your business where it's most needed, including Finance, Tax, HR, Technology, Legal & Compliance, particularly in the FinTech, financial services, and technology industries.

In addition to my 20-plus years serving as a Finance leader and CPA with a deep understanding of business models and technical skills, I have acted as a COO in many of my prior roles and was responsible for overseeing project management, real estate / IT investment evaluation, sales, and R&D.

PRACTICE FOCUS

Finance

- Mergers & Acquisitions
- Capital Raising (IPOs, Venture Capital / Private Equity)
- Strategic Planning & Analysis
- Capital Structure Advisory
- Investment Valuation and Due Diligence
- SEC Reporting
- Treasury and Cash Management
- GAAP Accounting
- Internal Budgeting and Forecasting
- Turnarounds
- Contract Negotiations
- Board Advisory and Presentations
- Investor Relations
- Internal / External Audits

Operations

- Consolidation & Acquisition
- Company Strategy
- Digital Transformation
- Organizational Alignment
- Compensation & Incentive Plan Design
- Human Resource Allocation
- Partnerships & Strategic Alliances
- Process Improvement
- Strategic Negotiations
- Strategic Transformation

SECTOR EXPERIENCE

Technology

- Software
- Cloud Technology
- Mobile Apps
- Artificial Intelligence / Robotics

Commercial Services

- Accounting, Audit & Tax
- BPO/Outsourcing Services
- Consulting Services

Financial Services

- Asset Management
 - Brokerage
 - International Banks
 - Investment Banks
 - Private Equity
 - National & Regional Commercial Banks
 - Thrifts & Mortgage Finance
- #### Fintech
- Capital Markets
 - Investment Management
 - Investment Research
 - Cryptocurrency

EDUCATION

University of Chicago Booth School of Business, MBA
University of Florida, MS in Computer Science