

Bespoke Search Group COO/General Counsel

Experience

Confidential

General Counsel & Chief Operating Officer

2022 to Present

Executive leader of privately held luxury home goods company

- Manage multiple teams across the Operations, Finance, Legal, Human Resources, Marketing, Corporate Development, Retail, Culture and Facilities functions while developing the core infrastructure, strategies and processes needed to fulfill the Company's mission
- Develop go-to-market strategy, new product commercialization, and operational strategy with defined KPIs for multiple business units, aligning each to drive overall Company performance
- Create a scalable, repeatable model for DTC customer acquisition, retail expansion and B2B division and execute on this model to ensure successful commercial units and cross-channel integration
- Provide leadership throughout the organization in order to attract, develop and retain a high-caliber team to create a culture which is disciplined, accountable and collaborative to achieve Company goals
- Daily focus on operational benchmarks and resources needed to achieve strategic goals, proactively driving process improvements throughout the business while assessing organizational structure and internal operations to optimize for efficiency
- Prepare and maintain long-term product and financial forecasts to be used for sales targets, financial benchmarking, and strategic modeling based on corporate goals and growth objectives
- Perform and coordinate product, consumer, technology and market opportunity assessments to provide insights on opportunities and implications across portfolio of business channels

Confidential (NYSE listed)

General Counsel & Chief Strategy Officer

2014 to 2022

Led X, Inc., a beverage alcohol company, from Series A through Initial Public Offering

- Responsible for all corporate financing strategy including mergers & acquisitions, corporate development, strategic partnerships, and capital transactions
- Acted as Company lead, in both legal and finance capacities, on all debt financing and six equity financing events, including the initial public offering on the New York Stock Exchange
- Oversaw all aspects of legal matters encompassing securities and SEC reporting, alcoholic beverage regulatory compliance, corporate governance, commercial transactions, intellectual property (IP), consumer protection, employment, litigation, and privacy practice areas while providing practical guidance to Company executives and cross functional teams on a broad range of strategic and commercial issues
- Directed corporate communications and investor relations with the financial community and shareholder base including all shareholder meetings, roadshows and private meetings, press conferences, earnings calls, investor relations websites, and annual reports
- Negotiated and draft financing, lease, vendor, licensing, endorsement, IP, joint venture, customer, supplier, marketing and commercial agreements
- Ensured compliance with, and develop strategy to navigate through, a highly complex alcoholic beverage regulatory scheme in 100+ jurisdictions while monitoring shifts in the applicable state and federal statutes
- Acted as Company liaison for all communications, actions and inquiries with relevant state and federal regulatory agencies such as the United States Food and Drug Administration (FDA), Alcohol & Tobacco Tax Trade Bureau (TTB), and California Department of Alcoholic Beverage Control (ABC)
- As corporate secretary, responsible for all corporate governance matters, establishing and administering corporate policies and records, while facilitating both internal and external director and officer communications

Confidential

Intellectual Property Strategy Professional

2013 to 2014

Intellectual Capital Merchant Banc providing financial services related to intangible assets

- Created complex financial models to value and assess value for a wide array of intellectual property matters
- Reviewed and analyzed licenses, supplier contracts and patent filings in preparation for litigation



- Assisted in the testimony and cross-examination of expert witnesses at depositions and trial
- Experienced in patent, trademark and commercial success cases in the computer, semiconductor, wireless communications, publishing, banking, and healthcare industries

Confidential, LLP

Associate

2012 to 2013

Confidential, Inc.

Mergers and Acquisitions Analyst

2011 to 2012

Education and Professional Licensing

University of Notre Dame

Juris Doctor (2012)

- Executive Board, Intellectual Property and Entrepreneurship Clinic

MBA, Corporate Finance concentration (2012)

- 1st Place: *Financing the Acquisition sponsored by General Electric* case competition

University of San Diego

BA Economics, *summa cum laude* (2008)

- President, University of San Diego Associated Students
- Honors Program, Trustee Scholar, Alcalá 100 award recipient, Mortar Board
- Thesis: *Price Elasticity of Los Angeles Lakers Tickets Approaching Perishability*

State Bar of California

Licensed Member

- California State Bar Association's Wiley E. Manuel Award for pro bono services

Select Board and Advisory Roles

Confidential

Portfolio Mentor

2018 to Present

Confidential

Board Advisor

Cannabis delivery business and marketplace focused on last-mile delivery

2020 to Present

Confidential

Board Advisor

An organic home textiles company

2021 to Present

Confidential

Board Advisor

CPG Beverage

2021 to Present

Confidential

Operating Partner

2022 to Present

Confidential

Board Advisor

A tequila for the next generation of consumers

2021 to Present

Confidential

Board Advisor

Premium high-quality apparel

2022 to Present