

# Jeffrey Suchocki, CFA

10324 E. Caribbean Lane  
Scottsdale, AZ 85255

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## OBJECTIVE

Seeking Senior Analyst/Director position with a dynamic small to mid-size actively managed investment group or equity fund in venture capital, hedge fund management or commercial real estate. Responsibilities would include overseeing and executing investment analysis, creating and managing decision analysis tools, interacting with management of potential targets, working with team to execute transactions, and assisting in overall management of the portfolio.

## PROFESSIONAL QUALIFICATIONS

- Chartered Financial Analyst
- Advanced MS Excel/Office skills
- Valuation Background
- Economic & Research Analysis
- Financial Modeling
- CBA Candidate
- Decision Analysis experience
- Big-Four background
- Excellent Communicator
- Financial Consulting
- Team-oriented
- Presentation Experience

## EDUCATION

**Masters of Business Administration** G.P.A. – 3.89/4.0 Arizona State University- Tempe, Arizona  
**Masters of Science, Economics** G.P.A. – 3.89/4.0 Arizona State University- Tempe, Arizona  
**Bachelor of Science, Finance** G.P.A. – 3.83/4.0 Canisius College- Buffalo, New York

## PROFESSIONAL EXPERIENCE

### **Strategic Value Group/Sinaiko Healthcare Consulting Business Valuation 2006-present**

- Created valuation model, workplans, review procedures and report template for 409(a) privately held common-stock valuation
- Created valuation model, workplans, review procedures and report template for physician practice valuations relating to fair market value opinions for acquisition targets of large Hospital and Medical Foundation groups.
- Performed analysis and wrote report on fair market compensation estimates for healthcare consulting firm in an “expert witness” litigation support assignment.
- Assisted counsel review financial information of bankrupt healthcare entity to determine resource availability during period involving dispute between patient and healthcare entity.
- Created documenting and referencing standards for valuation models and reports.

### **Mercer Transitions Business Valuation 2005**

- Managed financial model templates utilized for all dental practice valuations performed by the firm. Created appraisal report template based on International Business Appraisers’ (IBA) standards to be utilized for all dental practice appraisals issued by the firm. Designed custom financial models for “complex” cases. Responsible for writing and reviewing every appraisal issued by the firm during my tenure. Made over 10 presentations per month of financial analysis to clients. Averaged over \$30,000 per month in production.

### **KPMG, LLP / FTI Consulting Consulting and Analysis 2002-2004**

- Created financial model to assess economic damages related to a contract breach between a hotel developer and their former partner on a \$219 million project. Assessed appropriate discounting strategies based upon varying degree of risk associated with the sources of cash flows. Re-evaluated economic value of government incentive package associated with the project.
- Performed analysis on real estate disposition process for large mining company. Managed self and one associate through review of documentation relating to “irregular” transactions. Recreated series of events through creation of timelines, document catalogue, and relationship diagrams.

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## PROFESSIONAL EXPERIENCE (CONTINUED)

- Reviewed over 100 contracts between comparable parties involved in a dispute between a prison development company and a government consulting firm. Created financial model to assess damages associated with the alleged breach of contract.
- Managed team for execution of large complex intellectual property engagement spanning over six months. Project involved five associates charged with a variety of research tasks investigating the business practices of a number of Fortune 1000 firms with regards to their execution of intellectual property rights in the context of antitrust laws and commonly accepted legal practices.
- Performed extensive research involving the collection and dissemination of 130 different academic and case law articles for a case investigating the price efficiency of the used car market relative to the securities market for litigation involving a large U.S. automaker.
- Designed and presented a training course on the relationship between asset risk and the cost of capital.
- Collected, analyzed and reported market and industry information for an initial findings report for large technology client.
- Team member on largest known event study ever performed relating to bankruptcy of a large energy firm where we were investigating causal effect between information dissemination and “market” responses.

### **PricewaterhouseCoopers, LLP**

### **Consulting and Analysis**

**1999-2001**

- Performed over \$717 million in commercial real estate valuations utilizing Argus and DynaLease software.
- Team leader for internal audit engagement of \$11 billion waste management company, responsible for coordinating the tasks of a 7-member team working on five assignments.
- Performed statistical analysis in Microsoft Excel and Microsoft Access on over 40,000 records with 25 fields for a large technology firm involved in an Employment Retirement Income Security Act (ERISA) violations class action lawsuit.
- Performed economic damage analysis for intellectual property dispute against a \$170 million Silicon Valley technology firm. Reviewed financial records and press reports for comparable disputes and eventual solutions to those disputes.

### **Zelman Development Company**

### **Financial Analyst**

**1997-1999**

- Created standardized cash flow and proforma models that are still used today for investment projects totaling \$413 million.
- Created customized financial structure models for complex commercial real estate investment projects along with corresponding decision models that led to buy, sell or hold decisions on \$119 million of investment projects.
- Re-engineered annual operating budget for \$25 million managed real estate portfolio.
- Led discussion and implementation of upgraded accounting system.

### **Elias Asset Management**

### **Research Assistant (contract) 4/97-8/97 & 11/98 –1/99**

- Compiled and analyzed over 2,700 pages of research by top economists to develop topics for the book, *Dow 40,000*, by David Elias, released in 1997 and again in 1999.
- Researched and wrote reports on specific economic topics identified by the president of the firm, David Elias, for speeches and promotional appearances.

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## **Other Experience (academic or private consulting)**

- Created customized cash flow and proforma models for complex residential development projects totaling over \$250 million for large Southern California development firm that were used for investment decisions and for tracking ongoing cash flow variances.
- Conducted research and presented the results of a study on the impact of 9/11 on the financial condition and pricing strategies of the airline industry.
- Performed economic, industry and company analysis on a \$2.5 billion electronics distribution firm to determine the value of the firm's stock for an investment decision.

## **PROFESSIONAL MEMBERSHIPS**

Jeffrey is also a member of the Chartered Financial Analyst Institute (CFAI, formerly AIMR), the Phoenix Society of Financial Analysts, International Business Appraisers (IBA) and Beta Gamma Sigma.