

ALAN WOODS

Finance Executive | Controller | CFO

U.S. & EU Dual Citizen | English (C2) & Portuguese (C1)

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EXECUTIVE PROFILE

Seasoned finance executive with 25+ years building operations at Vanguard, BlackRock, Franklin Templeton, and Aegon Transamerica across investment management, family offices, and financial services. Expert in ERP implementation, close process optimization, FP&A, and international expansion. U.S./EU dual citizen with proven ability to establish and lead finance operations across North America and Europe.

KEY ACHIEVEMENTS

- \$825K** Revenue generated in 18 months (ApexVista real estate investments)
- 40%** Reduction in monthly close cycle (15-days → 9-days)
- \$1.4M+** Annual cost savings achieved (vendor optimization)
- 50%** Efficiency improvement (financial reporting redesign)
- \$2B** European fund assets under management (Luxembourg SICAV platform)
- 35+** Team members led across 7 countries

CORE COMPETENCIES

Finance Leadership

- Monthly close
- Financial reporting
- FP&A & budgeting
- Treasury management

ERP Systems

- Dynamics 365
- NetSuite
- SAP, Oracle
- System integration

International Operations

- Luxembourg SICAV
- CSSF compliance
- UCITS / cross-border
- Multi-country teams

Strategic Partnership

- M&A support
- Board reporting
- Banking relations

Regulatory & Audit

- SOX compliance
- SEC filings
- Internal controls

Team & Change Leadership

- Built teams from scratch
- 35+ staff across 7 countries
- Multicultural leadership

CAREER PROGRESSION

Current	ApexVista Asset Management Founder & Managing Principal
2023-2024	Crosstree Capital Partners VP Finance & CCO (Board Member)
2014-2023	Management Consulting Controller & Finance Transformation
2011-2014	Franklin Templeton Director of Marketing Operations (Global)
2009-2011	BlackRock Director of Finance (iShares ETF Platform)
1992-2002	Aegon Transamerica Managing Director (Luxembourg)
1987-1992	The Vanguard Group Senior Fund Accountant

IDEAL OPPORTUNITIES

- ✓ Director of Finance / CFO at investment or financial services firm or mid-market companies (\$50M-\$500M)
- ✓ U.S. companies expanding into Europe (Luxembourg, Netherlands, Portugal)
- ✓ European firms seeking U.S. market expertise
- ✓ Family Office seeking institutional-grade finance leadership
- ✓ Fractional/Interim CFO engagements (3-12 months)

Available for full-time roles (U.S. or Europe) or consulting engagements

EDUCATION & CREDENTIALS

MBA, Global Management (2002) | BSc, Finance (1991)