ALAN WOODS RESUME

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CHIEF FINANCIAL OFFICER (CFO) | CONTROLLER | VP FINANCE

Fund Administration & Fund Services | Investment Management | Cross-Border Leadership

Seasoned CFO and finance executive with 25+ years leading finance operations at Vanguard, Aegon Transamerica, BlackRock, and Franklin Templeton across investment management and financial services. Deep expertise in fund administration, fund accounting, financial reporting, FP&A, and cross-border operations. Proven leader in building finance teams, strengthening controls, and partnering with executive leadership through growth, M&A, and international expansion. **Dual U.S./EU citizen; native English, fluent Portuguese (C1)**.

SELECT LEADERSHIP ACHIEVEMENTS

International Expansion & Market Entry

- **Established Luxembourg SICAV (UCITS) and management company (ManCo)** for $60B asset management firm, serving high-net-worth investors and family offices; managed $2B in multi-generational assets across U.S. and European markets; managed entity formation and domiciliation, secured CSSF regulatory approval, and coordinated 12-month launch

Fund Operations Excellence & Team Building

- **Built fund accounting and financial reporting function** for mutual fund complex, scaling operations from $5B to $35B in AUM over 7-year period

PROFESSIONAL EXPERIENCE

ApexVista Asset Management, LLC – Tampa, FL
Founder & Managing Principal | February 2024 – Present
Boutique advisory and co-investment platform: fund finance and interim finance-leadership consulting, plus completed real estate co-investments.

- **Designed a budget governance framework for MyConnectivity GIE** (Luxembourg, 2026), connecting the Luxembourg standard chart of accounts with mission-based budget envelopes; delivered the budget charter and annual operating tools remotely; CEO reference available
- **Leading U.S. market-entry practice design** for a European professional-services firm (confidential, 2026–2027): entity activation, service and delivery design, and CPA sourcing
- Completed two full-lifecycle value-add residential transactions from acquisition through exit, **generating $825K in revenue,** including a 48-hour sale on the final disposition

Community Foundation of Tampa Bay – Tampa, FL
Interim Controller (contract via Taylor White) | August – October 2026

- **Ran the investment accounting close** on the newly implemented Foundant CommunitySuite platform; approximately 60 monthly reconciliations delivered on time
- **Built an interactive scenario tool** for the CFO's annual board forecast presentation: board what-ifs answered live as updating visuals, driven directly from the existing Excel forecast model with no rekeying
- **Built reusable Power Query reporting workbook** for Northern Trust pool grants and contributions, transitioned to the permanent Controller

Crosstree Capital Partners – Tampa, FL
Vice President of Finance & Chief Compliance Officer (Board Member) | December 2023 – July 2024
Recruited to build CFO-level financial infrastructure for a private-capital fund manager and M&A advisory firm; dual role as finance executive and board member, presenting quarterly to fellow directors on performance, risk, and strategy. Position eliminated in a company-wide reduction in force.

- **Built finance organization from ground up**, establishing FP&A function, financial reporting framework, broker-dealer regulatory reporting, and formalized internal controls previously absent
- **Oversaw fund administration** for Crosstree Capital Fund I, LP, a Delaware private equity fund (Reg D 506(b), 3(c)(1)), including administrator relationship management, capital calls and distributions, LP reporting, and K-1 tax reporting
- **Implemented cloud-based financial reporting platform**, creating real-time executive dashboards and reducing month-end reporting cycle from 15 to 9 days
- **Optimized cash positioning and treasury operations for $12M operating budget**, maintaining liquidity requirements while reducing idle cash by 18%; **managed banking relationships**

Management Consulting – Tampa, FL & Remote
Controller & Finance Transformation Consultant | 2014 – 2023
Delivered financial operations improvements, ERP implementations, and internal controls frameworks for Fortune 50 – 1000 companies across financial services, technology, pharmaceutical, manufacturing, and healthcare. Conducted engagements in 15+ U.S. states and internationally (the UK, Netherlands, Spain, Brazil). Delivered through Robert Half (Management Resources, Protiviti), RGP, and Control Solutions; additional clients include MetLife, CA Technologies (Broadcom), Syneos Health, Verint, Welbilt, Cendant, Dycom Industries, MissionSquare Retirement, and Stolt-Nielsen (SOX assessments in the Netherlands, Spain, and Brazil).
New Era Technology | PE-Backed Audio/Video & Collaboration Technology Integrator ($1B+ Revenue)
- **Served as interim Controller** for 14 months during significant senior leadership transition
- **Led ERP transformation** from Great Plains to Dynamics 365 across 7 subsidiary entities

Aegon Transamerica | Insurance, Retirement, and Asset Management ($300B+ AUMA)
- **Improved forecast accuracy** by 35% through rolling 12-month driver-based projections; identified $3.2M in operational cost savings via vendor consolidation and process automation

Barings Securities LLC | Investment Management Firm
- **Reengineered client lifecycle**, streamlining onboarding and private equity real estate operations

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Franklin Templeton Investments – San Mateo, CA & St. Petersburg, FL
Director of Marketing Operations | 2011 – 2013
Global head responsible for monthly accuracy and distribution of financial data across **15,000+ pages of marketing collateral** for $900B investment management firm.
- **Grew and led a team from 24 to 36 across 7 countries** with $12M operating budget; **achieved 20% cost savings while growing headcount by 50%** through strategic reorganization into low-cost COEs

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BlackRock, Inc. – San Francisco, CA
Director of Finance | iShares ETF Platform | 2009 – 2011
Oversaw financial reporting, fund accounting, fund operations, and regulatory compliance for $80B AUM.
- **Managed $6M budget** and team of 25 professionals supporting **215 investment products**
- **Achieved $1.4M in annual savings** through vendor renegotiation and printing/mailing optimization
- **Monitored performance of third-party fund administrators** through accumulated metrics
- Produced N-CSR, N-Q, and other SEC filings with **100% on-time compliance**

Aegon Transamerica Asset Management – Luxembourg & St. Petersburg, FL
Managing Director, Transamerica International (Luxembourg) / VP, Global Business Development | 2000 – 2002
- Established Luxembourg SICAV (UCITS) and management company (ManCo); secured CSSF regulatory approval and delivered 12-month launch; negotiated service agreements with 15+ European counterparties generating $8M annual revenue

Director of Finance | 1992 – 1999
- Led fund administration, fund accounting, compliance, expense management, and tax operations; scaled fund accounting operations from $5B to $35B AUM (IDEX Mutual Funds, later Transamerica Funds)

EDUCATION
MBA, Global Management | **BSc, Finance**

TECHNICAL SKILLS
ERP & EPM: Dynamics 365, NetSuite, SAP, Oracle, Hyperion, Sage Intacct, QuickBooks
Fund Accounting Platforms: Investran, Multifonds, FIS InvestOne, Advent Geneva
Reporting / Analytics: Power BI, Tableau, SQL, Advanced Excel (pivot tables, macros, modeling)
AI & Additional Applications: Generative AI for forecasting, reporting automation, and scenario analysis (ChatGPT, Microsoft Copilot, Claude); Salesforce, HubSpot, Python

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ADVISORY & GOVERNANCE
Family Office Advisory | Board Governance | Cross-Border Operations