



# *Curriculum Vitae*

## **Education**

- 2000                    *Honours Bachelor of Commerce, with Distinction*  
**McMaster University**  
• Dean's List, 1997 – 2000  
• Recipient of the Dr. H.L. Hooker and University Scholarships
- 2003                    *Qualified as a Chartered Financial Analyst*
- 2003                    *Qualified as a Chartered Business Valuator*
- 2006                    *Masters of Business Administration*  
**Queen's School of Business**
- 2007                    *Qualified as a Certified Management Accountant*  
• Top decile performance throughout the entrance exam syllabus

## **Other credentials**

*Department of Justice & Office of the Auditor General of Canada*  
Level II Security Clearance

*Canadian Securities Institute*  
Canadian Securities Course (CSC), Conduct & Practices Handbook  
(CPH) Course

## **Publications**

- 2006                    *To Infinity and Beyond: Exploring the Terminal Value Calculation*  
Business Valuation Digest  
Canadian Institute of Chartered Business Valuators
- 2007                    *Acquisitions & Divestitures of Private Companies*  
Chapter within the text 'Corporate Finance for Canadian Executives'  
Co-authored, with Mr. Howard E. Johnson  
Carswell Publishing

## **Expert testimony**

*Lombard Financial Group, Inc. v. Davies & Co., 2005 ABQB 387*  
Court of Queen's Bench, Alberta