**THOMAS ADAM GUSTAFSON, MBA, CMA, CFA Candidate**

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**SUMMARY**

Accomplished, goal-oriented M&A professional with excellent experience in leading acquisition and divestiture processes, underwriting loans, restructuring distressed loans, negotiations, and financial reporting. Established capabilities in cross-functional due diligence, budgeting, financial modeling, valuation, and strategic planning. Outstanding team leadership skills that produce exceptional results. Perceptive and visionary top performer who drives organizations to maximize growth, profitability, and efficiency.

**EXPERIENCE**

**Founder and Managing Director,** 04/2023-Present

Grand National Consulting, LLC., Minneapolis, MN

M&A consulting firm providing business development, valuation, due diligence and M&A services.

* Formed to offer contract services while continuing to search for full time positions.
* Evaluate market landscape for attractive platform company acquisitions.
* Foster relationships with potential company owners, investment bankers and business brokers.
* Perform end market, financial and operational due diligence on select platform companies.

**Corporate Development Officer,** 01/2023-03/2023

Transitions Group, LLC. (Private Equity sponsor Lorient Capital, LLC.), Chicago, IL

$50M revenue in home hospice service provider with a regional acquisition expansion strategy.

* Performed diligence and created operational databooks, valuation analyses and investment committee memorandums for two regional hospice acquisition targets providing key statistics and valuation information on opportunities to significantly increase revenue and geographic coverage.
* Advised C-suite creating annual budgeting process and liquidity monitoring highlighting areas of liquidity concern supporting urgent management decisions on cash conservation measures.
* Developed a startup office expansion plan and two joint venture financial model proposals highlighting the most attractive geographic areas and JV partners to pursue.
* A majority of new top management were laid off in March due to unforeseen liquidity issues.

**Director of Loans and Acquisitions,** 06/2019-11/2022

Starkey Hearing Technologies, INC., Minneapolis, MN

$1B revenue privately held global hearing aid manufacturer with ~5k independent retail hearing aid clinics, ~1,600 employees and ~750 owned retail clinics with a global roll-up strategy.

* Improved top line revenue and retail subsidiary EBITDA as head of acquisitions, divestitures, new loan originations and distressed loan restructurings.
* Executed diligence and negotiated agreements on 55 domestic and international acquisitions totaling $65M and 170 clinics, divested over 65 underperforming locations totaling $4M+.
* Managed $200M loan portfolio. Analyzed, underwrote, and originated loans to Starkey customers for expansion and acquisitions. Originated or restructured 140+ loans totaling $66M+.
* Developed process improvements of loan origination and acquisitions including design and implementation of a new workflow processing software and updates to existing reporting.

**Corporate Development Manager,** 11/2017-05/2019

Johnson Controls, INC. (NYSE:JCI), Milwaukee, WI

$30B global building products industrial conglomerate with ~100k+ employees worldwide.

* Grew corporate revenue through analysis and process of 28 acquisition and divestiture projects ranging from $600k-$6.6B on a high-performing team of ten people who managed all M&A and JV activity across all of JCI’s business units.
* Accomplished corporate goal of closing ten deals in FY18 and maintained a pipeline of over 25 active projects at various stages.
* Deal quarterbacked two closed acquisitions of $13M and $32M and one divestiture of $200M+.

**Corporate Leadership Development Associate,** 05/2016-10/2017

**Summer International Pricing Manager,** 05/2015-08/2015

Fiat Chrysler Automobiles US, LLC. (NYSE:STLA), Detroit, MI

* Improved corporate efficiencies through due diligence on business units and organizational audits.
* Developed high-impact remediation plans to reduce risk, eliminate waste, and improve corporate processes.
* Designed cross-functional business process flows and automated currency fluctuation analysis tools streamlining operational decisions regarding currency shifts.
* Implemented product rationalization for ASEAN market portfolio reducing complexity by 80%.

**Investment Banking Associate,** 01/2014-07/2014

**IT Manager,** 02/2012-07/2014

**Analyst,** 02/2012-12/2013

BMO Capital Markets, INC. (NYSE:BMO) (f/k/a Greene Holcomb Fisher, LLC.), Minneapolis, MN

* Closed ten deals as an investment banking associate responsible for providing sell-side M&A services to companies, with the process including market sizing and research, development of confidential information memorandums, management presentations, contacting prospective buyers, and leading them through a sales auction process to a successful close.
* Created over 20 sales pitch presentations for prospective clients including DCF, comparable public company, precedent transactions, and LBO analyses.
* Oversaw company-wide IT administration during position as additional responsibility not carried by any other analysts or associates.

**Management Consulting Analyst,** 08/2009-01/2012

**Summer Management Consulting Analyst,** 05/2008-08/2008

Accenture, PLC. (NYSE:ACN), Minneapolis, MN

* Analyzed vendor management practices at SunTrust Bank HQ, identified gaps, and determined future state, resulting in a new business unit of eight FTEs, satisfying new Federal Reserve requirements.
* Created process improvement plan at UnitedHealth Group for over $100M in savings and led software implementation resulting in 90 FTE efficiency improvements.

**EDUCATION**

**MBA, Focus: Mergers and Acquisitions, General Management,** 2016.

Cornell University – S.C. Johnson Graduate School of Management, Ithaca, New York.

Full time two year on campus Master of Business Administration program.

Study Abroad Programs: J term 2015, Dubai; Spring 2016, FGV EBAPE, Rio de Janeiro, Brazil.

**BS, Business, Double Major: Finance, Entrepreneurial Management,** 2009.

University of Minnesota Twin Cities - Carlson School of Management, Minneapolis, Minnesota.

Full time four year on campus Bachelor of Science in Business program.

Study Abroad Program: Spring 2009, Singapore Management University, Singapore.

**CERTIFICATIONS**

Certified Management Accountant: Issued 11/1/2024, ID 135178

Institute of Management Accountants

Private Markets and Alternative Investments: Issued 10/7/2024, ID 117694437

Chartered Financial Analyst (CFA) Level 1 Candidate 2025

CFA Institute

**PERSONAL**

* Fully remodeled three homes including carpentry, tiling, plumbing, electrical, patios and painting.
* Active member of Porsche Club of America, Minnesota Grand National and T-Type Association,
* Purchased, restored, and sold classic automobiles, coordinated logistics with out-of-state buyers and sellers, and realized an average return on investment of 65%.

**VOLUNTEER**

Arc’s Value Village, Feed My Starving Children, Ferndale Cat Shelter, Mary’s Place.

