

# ROBERT G. DEAN

Visiting Instructor of Finance  
Haub School of Business  
St Joseph's University  
Philadelphia, PA 19131

---

---

## PROFILE

Proven financial manager with significant M&A (100+) and planning finance/accounting credentials and extensive experience in multiple industries. Core competencies include:

- Financial management know-how in multiple industries
- Private and public company experience
- Research, analysis and industry knowledge
- Modeling, & forecasting
- Strategic and tactical planning
- Collaborative leadership style

## EXPERIENCE

**DEAN CONSULTING**, Philadelphia, PA 11/07-8/11  
Buy and sell-side M&A and Business Consultant. Adjunct professor of Finance at St. Joseph's Haub School of Business and DeVry/Keller University.

**INTERACTIVE MORTGAGE ADVISORS LLC**, Denver, CO 4/07-10/07  
**Broker of mortgage servicing**  
**Director of Mergers and Acquisitions**  
Head of a new initiative to diversify the firm's business by providing value-added M&A services to existing clients as well as developing new clients, mostly large public and mid-market private mortgage companies. Industry pressures prompted the firm to pull back before fully rolling it out.

**GMAC RESIDENTIAL MORTGAGE**, Horsham, PA 2000-2007  
**Prime Division, 7<sup>th</sup> largest nationally ('07)**  
**Director of Mergers and Acquisitions**  
Responsible for all Enterprise level M&A activity including developing strategy, sourcing, coordination and liaison with targets and intermediaries. Coordinated the process including NDAs, discovery, valuation, LOIs, governance issues, cross-functional due diligence teams; crafting structures and term sheets; reviewing Definitive Agreements and closing. Collaborated with lines of business executives to evaluate opportunities and communicate them to executive management.

- Identified 60 best nationwide private market opportunities in best states based upon purchase business and best states to grow by acquisition versus grow organically. Acquired several regional companies in seven states representing over \$5B in originations.
- Managed windup of six CVC subsidiaries; wrote offering memos.

**CORNERSTORE24.COM, LLC**, Chester Springs, PA 1999-2000  
**e-Commerce Website developer**  
**CFO/COO**  
Controller/COO and Investor in an Internet B2C start-up company. Responsible for accounting, tax and cash management, proposals to financing sources, crafting proposals for business alliances, procurement, pricing, and administrative operations.

**WALLINGFORD CAPITAL CORP.**, Annapolis, MD

1994-1998

**Boutique investment banker in healthcare**

**Vice President, Finance**

A private “boutique” intermediary representing both sellers and buyers in select high-growth business outsourcing service companies including Physician Practice Management (PPMs), medical billing, clinical labs, information technology, and medical consultants. Principals have since retired.

- Transacted 19 companies representing \$300+ million in value.
- Performed valuations, researched accounting and tax treatments.

**NOVACARE** Outpatient Rehabilitation Division, King of Prussia, PA

1992-1994

**High growth physical therapy company**

**Director, Planning & Development**

Ranked *Philadelphia Inquirer's* #1 Growth Company in 1992 with the highest margins in the NovaCare affiliated group. Led business planning and analysis function for start-up company in 1991, with IPO June 1992 and merged with NovaCare February 1994; Sales at IPO: \$40 million, last \$300+ million.

- Reviewed and integrated more than 80 acquisitions representing \$100+ million in value
- Developed goals, organized and led planning retreats, and guided operating staff in preparation of plans. Consolidated and modeled plans.
- Assisted CFO in dealing with outside analysts; analyzed results vs. plan, prepared financial analysis, forecasts, and administered risk management.

**Increasingly Responsible PLANNING LEADERSHIP Positions** with:

1975-1991

- ADVANTA Corp (credit card bank), Horsham, PA,
- MERITOR FINANCIAL/PSFS (thrift bank sold to Mellon Bank), Philadelphia, PA
- WACHOVIA, NB (formerly Central Penn NB), Philadelphia, PA

## **EDUCATION**

MS Finance & MBA, Drexel University, Philadelphia, PA, (1998)

Passed all parts Uniform CPA Exam - 1992

Drexel University, post-undergrad accounting credits for PA CPA (1991-2)

BA English, Franklin & Marshall College, Lancaster, PA (1973)

American Society of Appraisers:

Completed all Coursework for Accredited Senior Appraiser in Business Valuation

## **OTHER**

PADI Scuba Instructor (ret.)/Award-winning Photographer

## TEACHING QUALIFICATIONS & EXPERIENCE

### EDUCATION

MS/MBA Finance, Drexel University, Philadelphia, PA (GPA 3.5)	1998
Passed all parts Uniform CPA Exam (Pennsylvania)	1992
Drexel University, 24 undergrad accounting credits for PA CPA (GPA 4.0)	1991-2
Drexel University Evening Division 24 undergrad credits Business (GPA 3.5)	1981-1991
BA English, Franklin & Marshall College, Lancaster, PA	1973
Swarthmore High School, Swarthmore, PA	1969

### PROFESSIONAL QUALIFICATIONS

American Society of Appraisers: Completed all coursework for Accredited Senior Appraiser in Business Valuation	2001-2005
--	-----------

### PROFESSIONAL MEMBERSHIPS

American Society of Appraisers (Business Valuation Division)	2001-2009
Association for Corporate Growth (Philadelphia Chapter )	2006-2009
Professional Association of Dive Instructors (Instructor)	2001-2010

### ACADEMIC COURSES TAUGHT

Adjunct Professor / St. Joseph's University / Haub School of Business / Philadelphia, PA		
Mergers & Acquisitions	– Undergrad	Fall '08,'09,'10
	– Graduate	Sum II '09,Spr '10, Sum I '11, Fall '11
Derivative Markets	– Graduate	Summer II 2008
Topics in Finance	– Graduate	Summer I 2009
Advanced Financial Management	– Graduate	Spring, 2011
Shareholder Value Management	– Graduate	Fall, 2011
Speculative Markets	– Undergraduate	Spring 2009
Small Business Finance	– Undergraduate	Spring '10, '11
Investments	– Undergraduate	Summer I '10, Fall '11
Portfolio Management	– Undergraduate	Summer II, 2011
Financial Management	– Undergraduate	Summer II, 2011
Business Policy	– Undergraduate	Fall 2010, Spring 2011
Advisor/SJU Team – ACG Phila MBA Case Competition '09 (2 <sup>nd</sup> Place), '10 (1 <sup>st</sup> Place),'11		
Adjunct Professor / Dowling College / Executive MBA (State Farm / Concordville, PA)		
Managerial Accounting	– Graduate	Summer 2008
Financial Management	– Graduate	Fall 2008
Quantitative Methods (LP)	– Graduate	Spring 2009
Adjunct Professor / DeVry University / Horsham, PA		
Financial Accounting (e-course)	– Undergrad	Spring '10, Summer '10, Spring 2011
Business Policy (e-course)	– Undergraduate	Summer 2010
Financial Management	– Graduate	Summer 2010, Fall 2010, Winter 2011
Intermediate Accounting III	– Graduate	Spring 2011
Instructor / PA Institute of Technology / Media, PA		
Finance and Investments		Spring 2008
Intermediate Accounting		Fall 2008, Spring 2009

Guest Judge

Final Round / Business Policy Case Competition (Temple U)

Spring 2008

Final Round / Business Policy Case Competition (St. Joe's)

Spring 2009

Final Round / Business Policy Case Competition (Grad-Keller/DeVry)

Spring 2010

## **PUBLICATIONS**

*Corporate Hurdle Rates versus Business Valuation Discount Rates*  
(Enterprise Appraisal Company – Monthly Newsletter)

Summer 2009

*Strategic Management: A Cross-Functional Approach*, 4<sup>th</sup> ed (tbd 2012) by Stephen J. Porth  
Contributor Chapter 7, section “**Business Valuation: Determining What a Firm is Worth**”?