

BRADFORD S. BODINE

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PERFORMANCE SUMMARY

An Innovative and Creative Senior Executive in the Private and Public Institutional Fixed Income industry with experience in organizations ranging from startups to \$22B global businesses, achieving and managing revenue goals of up to \$50M, operational budgets of up to \$30M, and capital expense budgets of up to \$125M. A capable mentor, having a record of attracting, recruiting, hiring, and mentoring teams of up to 120 employees, establishing the infrastructure that has repeatedly resulted in accelerated performance and led to valuation growth and successful shareholder exits.

ACHIEVEMENT CATEGORIES REPRESENTED BELOW

- Global / National Strategic Planning
- Board Leadership
- Market Share Capture
- Operational Optimization
- Fund Launch
- Investor Relations
- Revenue Capture
- Vendor Selection / Negotiations
- Business Development
- Profit Optimization
- Diversity Promotion
- Product Line Expansion

ACHIEVEMENT CATEGORIES DETAILED

NOTE: HOVER CURSOR OVER [BLUE UNDERLINED TEXT](#) FOR EXPANDED JOB DESCRIPTIONS AND CLICK (CONTROL CLICK FOR PC USERS) TO FOLLOW LINKS TO WEBSITES & PRESS RELEASES

[Cortlandt Capital Advisors LLC](#), NEW YORK, NY

2017 –

A Private Capital Sourcing, Advisory, and Incubation Platform.

[CEO & President](#)

\$1M OPEX and \$200M Revenue Goal and 8 employees with 4 direct and 9 outside advisory. Responsible for establishing and managing client-focused business.

Scope of Responsibility: Recruit and manage highly skilled team members for privately funded, project-specific, assignments. Solicit client mandates and ensure team performance through to successful deliverable and project completion. **The following are a few notable projects.**

- **Project Selection / Negotiations:** Responsible for “deal flow” and project assignments. Specific “active” projects include: Start-up \$1bil block-chain based digital consumer finance project, 4,000 acre “city of the future” development in mid-Atlantic region, Funding of de novo Multi-Family Regional Strat Fund, Capital Sourcing for cutting edge Hydroponic Agriculture business, and Advising and Client Sourcing for unique charitable giving enterprise.

[BONNEVILLE MULTIFAMILY CAPITAL](#), SALT LAKE CITY, UT

2015 – 2017

A \$15M Commercial Real Estate Finance company with 75 employees.

[Principal & President of Bonneville Capital Markets](#)

\$1M OPEX and \$10M Revenue Goal and 15 employees with 3 direct. Responsible for establishing and managing broker dealer.

Scope of Responsibility: Recruited by a Board Member to establish a privately funded structure and model for a HUD Finance business. Created the unique solution with partnership buy-in. Developed fund construct, hired attorneys, drafted S-1 document, and conceived the novel approach. Within 180 days, delivered a real-estate loan fund solution for investors with side-car broker dealer license allowing for issuance and secondary sales and trading of fund securities. This delivered an innovative way to source capital and generate investor returns in an illiquid space. **The following are a few notable benefits.**

- **Vendor Selection / Negotiations:** Tasked to find and retain efficient, experienced, fair priced legal counsel for fund creation and SEC filing of an S-1. Board approved law firm selection, and later tasked with negotiating and securing engagement agreement. Expertise delivered a cutting-edge finance strategy with cost efficient services. **“Fee creep” was avoided as “fee driven” payment model was replaced with “pay for performance” model.**
- **Corporate Image Development:** To improve corporate image, built a state-of-the-art web presence. Investigated multiple vendors, selected, negotiated, and collaborated on web strategy, design, and content and interviewed and mentored a Marketing Manager. This delivered a web presence with a clear mission and client engagement that immediately yielded deal flow. **Achieved effective client outreach and lead generation with 33% to 50% CAGR on clicks, time on site, organic search results, paid search results, and customer conversion.**

[CANACCORD GENUITY GROUP INC.](#), NEW YORK, NY

2013 – 2014

A ~\$1B Investment Banking company with 2,000 employees

[Sr. Managing Director, Global Head of Institutional Fixed Income](#)

\$5M OPEX, \$30M Revenue Goal and 60 employees with 5 direct. Responsible for sales, trading, and research of fixed income products.

- **Global Strategic Planning:** Recruited by the CEO of Canaccord Genuity Group in the wake of the successful development, launch and sale of Cortview to duplicate that success and build an institutional fixed income business from startup. Investigation revealed the need to leverage distribution of risk through cross-border transactions. Built the first corporate strategy and led internal communication and execution. **This delivered the business unit and resulted in the first true cross-border transaction with an end client in the UK.**

[AMHEARST PIERPONT](#) (FORMERLY [CORTVIEW CAPITAL/PIERPONT SECURITIES](#) - ACQUIRED BY SANTANDER), NEW YORK, NY

2009 – 2013

A \$36M Investment Banking company with 120 employees

[Operating Committee Member/Group Head, Credit, Cortview/Pierpont Securities](#) (2012 – 2013)

\$30M OPEX, \$35M CAPEX, \$55M Revenue Goal and 120 employees with 10 direct. Responsible for leading, planning, and executing strategy to build fixed income focused firm.

[Chairman, & Managing Director, Cortview Capital](#) (2009 – 2012)

\$30M OPEX, \$35M CAPEX, \$55M Revenue Goal and 120 employees with 10 direct. Responsible for leading, planning, and executing strategy to build fixed income focused firm.

ACHIEVED WHILE CHAIRMAN, & MANAGING DIRECTOR, CORTVIEW CAPITAL

Scope of Responsibility & Achievement: While formulating the business plan, determined to properly fund and capitalize the day-to-day operations of a risk-taking broker dealer, in a mature market where a lack of available private capital (financial services sector) existed. Built the strategy the first 90 days, made hundreds of calls to various capital providers and scheduled dozens of meetings, finally securing Warburg Pincus. This resulted in \$125M, an appropriate market facing capital base, which validated the firm's ability to transact effectively with large institutional clients. **This established significant credibility and Cortview Capital became an attractive acquisition and was sold to Pierpont (now Amhearsst Pierpont). The following are a few other notable ensuing events:**

- **Business Development / Product Line Expansion:** Championed the effort to attract talent in a complex and competitive market, determined to build world-class, well-capitalized, middle market focused broker dealer. Created the strategy, recruited partners and delegated tasks through startup. Within 90 days, showcased Warburg Pincus involvement, hired Managing Directors, formed teams, and led communication with clients. Reached critical mass within 18 months and delivered a positive P&L run rate. **This delivered a self-sufficient fully capitalized broker dealer with significant market share.**

GROUP HEAD, CREDIT, CORTVIEW / PIERPONT SECURITIES

- **Profit Optimization:** Challenged by the Board to produce acceptable returns on capital for private equity investor and partner. Created the plan and maintained discipline around hiring and managing ratio of sales, trading, and support while aggressively growing the business by identifying and recruiting talent with specific skills. This resulted in immediate profitability per hire versus their compensation expense. **Achieved nearly 3X industry normal net margins (24%) in a largely compensation driven expense-based business.**

WACHOVIA SECURITIES, (NOW WELLS FARGO) NEW YORK, NY

2004 – 2009

A \$3B Investment Banking company with 4,000 employees

Head of Hedge Fund Coverage (2007 – 2009)

Responsible for coordination and integration of client engagement activities and deliver the firm's resources profitably.

Director, Institutional Fixed Income (2004 – 2007)

\$7.5M Revenue Goal and 5 direct employees. Responsible for institutional client coverage for fixed income products.

- **Turnaround / Revenue Optimization / Marquee Customer Capture:** Selected by the Head of Credit Sales & Trading to service and monetize the market's largest potential client. Developed the plan and leveraged the existing groups servicing the client. Within 180 days, brought all firm assets to bear and created a "high touch" approach. This resulted in better coverage, service, and execution while driving a 10X revenue improvement to \$4M the first year, which became a ripple effect on P&L for the trading desk. **Was promoted to Head of Hedge Fund Coverage Group.**

BARCLAYS CAPITAL, NEW YORK, NY

2000 – 2004

A \$3B Investment Banking company with 7,800 employees

Director, Institutional Fixed Income

\$7.5M Revenue Goal and 5 employees with 1 direct. Responsible for institutional client coverage for fixed income products.

- **Business-Technology Partnership:** Discovered the need for daily sales "axes" to be organized by client inquiry and driven by market opportunities. Created the strategy and presented it to senior management. Partnered with external technical team to create a state-of-the-art trade capture system, driving effective sales and trading efforts while allowing for more prudent management of risk. **This became a primary industry-wide tool for technical elevation of fixed income platforms to document all trades, inventory, client flow, portfolio analysis, and trade reversal opportunities.**

CREDIT SUISSE FIRST BOSTON, NEW YORK, NY

1989 – 2000

A \$4B Investment Banking company with 15,000 employees

Vice President, Institutional Fixed Income

\$10M Revenue Goal and 6 employees with 1 direct. Responsible for institutional client coverage for fixed income products

- **Program / Project Leadership:** Recruited and selected by leadership to move sales reporting from inflexible and static fixed daily (printed) reports to a cloud-based sales management system. Developed plan and budget, formed IT team, surveyed critical users for needs and feedback. **Delivered system within 1 year, at 10% of budgeted cost, which improved flexibility, usability, accessibility of reporting for all members of sales management.**

EDUCATION**COLUMBIA UNIVERSITY, NEW YORK, NY**

B.A., Economics - Concentration in LDC Economies with Honors

BOARDS

Boy Scouts of America – Executive Board Westchester Putnam Council (Audit Chair, FOS Chair, Treasury Committee) 2017-2018

Cortview/Warburg Pincus – Executive Chairman and Board Member 2010-2012

Scarsdale Golf Club – Board Member (Membership Chair, Admissions Chair, Activities Chair) 2008-2010

Snow Country Condos Board - Park City, UT (Treasurer) 2015-2016