

SHARON D. SHAFFER

5455 Fawnbrook Lane
Dublin, OH 43017

(614) 507-6656
sdshaffer4@gmail.com

EMPLOYMENT

- THE OHIO STATE UNIVERSITY** 2020-Present
Senior Lecturer, Fisher College of Business
- Introduction to Real Estate
 - Real Estate Planning and Development
 - Investments
- Academic Advisor, Women in Real Estate (WIRE), student organization 2023-Present
- SERVICE WIRE COMPANY** 2020-Present
Board Member and Investment Committee Chair
- WALLICK COMPANIES** 2012-2020
Wallick Companies is a multi-family housing provider serving affordable and senior living markets. The firm has four business divisions, including development, construction, property management and asset management.
- Chief Strategy Officer & Senior Vice President, Senior Living Development
- Real estate development of assisted living and memory care communities
 - Develop three-year strategic plan and implement measurement and reporting on key drivers of results
 - Advocate on behalf of affordable assisted living within Ohio General Assembly and State Agencies
- Senior Vice President, Asset Management
- Owner representative on 82 real estate partnerships which include subsidized, tax credit, assisted living and student housing
 - Responsibilities also include purchasing and resident services
- RED CAPITAL GROUP** 2003-2012
Red Capital Group, a subsidiary of ORIX USA, is a multi-family and seniors housing investment banking firm.
- Senior Managing Director, Affordable Housing / Low Income Housing Tax Credits
- Syndicate and manage over \$1.5 billion in third party real estate equity investments
 - Model tax credit & real estate project loss benefits for purchase of tax credits from real estate developers
 - Underwrite equity purchase of low-income tax credits on new construction and rehabilitation projects
- Asset Backed Securitization
- Responsible for marketing ABS capabilities to financial institutions and finance companies with portfolios of originated assets \$25 – 200 million
 - Syndicated \$10 million of existing client exposure
 - Designed and implemented marketing campaign targeting Professional Practice / Small Business Lenders
 - Niche player focused on working with first-time issuers and esoteric asset originators
 - Recognized as one of the largest originators of Small Business Loan securitizations in 2003
- TEXTRON FINANCIAL CORPORATION** 2001-2003
Textron Financial Corporation, a division of Textron, Inc., is a diversified commercial finance company with core operations in four segments: Revolving Credit, Specialty Finance, Structured Capital and Aircraft Finance.
- Director of Acquisitions and Syndications
- Identify lending partners for credit opportunities over \$10 million originated in Asset Based Lending
 - Created an active list and dialog with 175 regional banks and finance companies interested in participating in asset-based transactions
 - Syndicated \$17 million in credit exposure for division
 - Assisted in structuring asset-based transactions within the following industries: independent finance companies, telecommunications, energy, transportation, staffing, manufacturing, distribution and retail
 - Managed all portfolio acquisitions and dispositions for ABL division
- Director of Business Development

SHARON D. SHAFFER

5455 Fawnbrook Lane
Dublin, OH 43017

(614) 507-6656
sdshaffer4@gmail.com

- Responsible for originating \$32 million in asset-based and structured lending credit facilities for specialty finance companies; strong relationship calling skills focused on working with CEOs and CFOs in middle market; developed database of 1500+ contacts with independent finance companies and referral sources

FIFTH THIRD BANK

1997-2001

Middle Market Corporate Lender

- Originated \$20 million annually in new credit exposure. Managed \$50 million credit portfolio.
- Responsible for cross-selling services to Corporate Trust Department, Employee Benefit Banking (retail services), Corporate Credit Card Services, Treasury Management and Private Banking
- Managed Commercial Associate program – marketing, hiring, and training of Associates for the Corporate Banking Department. Directly responsible for management of two Associates in Corporate Banking and four direct placements of Associates in Treasury Management and Commercial Real Estate Departments
- Designed and implemented Risk Management assessment, training and monitoring program for 50+ members of the Corporate Banking Department

WHEELING NATIONAL BANK

1995-1997

Commercial Lender

- Underwrote and managed a \$7 million portfolio
- Originated commercial loans with emphasis on Small Business Administration (SBA) guaranteed products. Wheeling National Bank was a Preferred Lender with the SBA.
- Completed a \$4 million leveraged Employee Stock Option Plan (ESOP) loan
- Designated lender to handle high wealth clients. Bank did not have a Private Banking department.

ONE VALLEY BANK

1993-1995

Commercial Lender

- Originated small business commercial loans and residential construction mortgages
- Managed \$16 million portfolio of credit exposure
- Completed RMA Commercial Lending School and Omega Sales Training

BANK ONE

1990-1993

Private Banker

- Researched, developed, and implemented Private Banking Department that helped to leverage strength of Trust/Investment's asset management capabilities and market presence of Corporate Banking

Investment Analyst

- Responsible for developing and implementing proprietary family of mutual funds for bank holding company (predecessor to Bank One, West Virginia). Trained to be portfolio manager for the money market fund.
- Drafted bill that was signed into law by West Virginia legislature that allowed banks and other financial intermediaries to charge a fee on proprietary mutual funds

PROFESSIONAL DEVELOPMENT

CHARTERED FINANCIAL ANALYST (CFA)

1995-Present

MARSHALL UNIVERSITY FOUNDATION

2012-Present

Past Chair of institutionally related educational foundation which oversees management of \$250 million endowment. Positions held over last ten years include Vice Chair as well as Chair of Investment Committee

SOCIETY OF YEAGER SCHOLARS

2003-2014

Board member for four-year, full-tuition competitive scholarship with emphasis on academic excellence and leadership development

EDUCATION

OHIO STATE UNIVERSITY

1997-1999

MBA concentration in Corporate Finance

MARSHALL UNIVERSITY

1987-1991

BS Finance, Magna Cum Laude Graduate

Received a four-year, full-tuition scholarship from Society of Yeager Scholars

SHARON D. SHAFFER

5455 Fawnbrook Lane
Dublin, OH 43017

(614) 507-6656
sdshaffer4@gmail.com

Varsity Volleyball