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SUMMARY

- Bilingual executive with 20+ years of financial services experience
- Currently Chief Product Officer and Global Head of Client Relations for Oaktree Capital Management, a leading alternative asset manager with ~\$190 billion in assets under management across credit, private equity, real estate, infrastructure and listed equities
- Core expertise in:
 - Corporate strategy, branding and marketing
 - Product development and pricing
 - Financial planning and analysis
 - Customer relationship management and client operations
 - Change management and business process reengineering
 - Organizational design, transformation and management
 - Operational strategy and growth initiatives
- Dynamic business executive who has delivered results as a global leader of multi-disciplinary teams and functions
- Strategic leader that emphasizes the achievement of desired business outcomes via the alignment and organization of people, product, process and technology
- Experienced at running large-scale, high-stakes organizational initiatives that require consensus-building among executive teams as well as strategic and financial planning
- Particular expertise in strategy and growth-related initiatives as well as business/team implementations, restructurings and integrations
- Active mentor/advisor to mid-level executives undertaking organizational transformation, culture- and brand-related initiatives

Executive Highlights

EXPERIENCE

Azorra Aviation (2021-present)

Board Member (ESG Committee Chair, Audit Committee Member)

Oaktree Capital Management (2006 – Present)

Executive Leadership

- Management Committee (Co-Chair)
- Senior Leadership Council
- Growth Strategy Committee
- Operations Committee
- Product Governance Board (Head, 2017-2022)
- ESG (Environmental, Social & Governance) Taskforce (2017-2021)
- Diversity & Inclusion Council
- Information Technology Project Board
- Crisis Management Team
- 401k Policy Committee

Positions Held

- Chief Product Officer (2017 – Present)
- Global Head of Client Relations (2010 – Present)
- Head of Portfolio Analytics, Risk & Reporting (2010 – 2017)
- Head of Corporate Investor Relations (2007 – 2009)
- Marketing Representative (2006 – 2007)

Goldman Sachs (2000 – 2004)

- Executive Office Client Strategy Team (2003 – 2004)
- Equities and Investment Management Divisions (2000 – 2003)

EDUCATION/OTHER

- MBA, UCLA Anderson School of Management (2006)
 - Anderson Fellow, J. Fred Weston Award for Academic Excellence in Finance, Toigo Fellow, National Society of Hispanic MBAs Fellow, Sanford Sigoloff Fellow, Deloitte Consulting Award for Management Field Study Achievement
 - President, UCLA Anderson Study Body
- BA, Duke University (2000)
 - Phi Beta Kappa, Magna Cum Laude, Arts & Sciences Curriculum Committee Member
- National Association of Corporate Directors (NACD) Certified
- Former board member, Friends of Foothill Family Service, a non-profit serving California's San Gabriel Valley
- Native speaker of English and Spanish