

# DAI SHI

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## SUMMARY

A driven and highly accomplished senior finance executive and consultant with comprehensive global and domestic expertise in M&A management, corporate governance, IPO preparation, strategy development, and customer relationship management. Excels at driving strong financial performance, with extensive expertise in M&A within emerging markets. Leverages dynamic skillset (including financial planning and analysis) to drive sustainable growth across leading financial institutions. Proven success in providing the operational leadership, resources, and overall know-how to fully maximize enterprise value and extend operational efficiency.

International Expansion | Asset Management | Regulatory Compliance  
Capital Deployment | Risk Management | Continuous Improvement  
Board Reporting | Business Performance Analysis | Treasury Management | S-1 Registration

## EXPERIENCE

MISSIONSQUARE RETIREMENT, Washington, D.C.  
**Chief Financial Officer**, 2020-2025

- Applied financial expertise and strategic vision to drive sustainable growth and long-term success.
- Revitalized organization facing turnaround challenges, generating positive operating cash flows and expanding client base by 6% from 2020 to 2024 (all while keeping expenses flat).
- Restored profitability and strengthened primary operations.
- Provided collaborative, board-level leadership. Acted as treasurer of Mission Square Foundation.

EQUITABLE (f/k/a AXA US), New York, New York  
**Group Retirement CFO**, 2015-2020

- Played pivotal role preparing company for IPO in May 2018.
- Developed IPO roadshow materials and presentations for credit rating agencies.
- Drafted MD&A and managed preparation of S-1 registration statements.
- Continued to provide strategic guidance post-IPO, supporting investors and interpreting results for market.
- Advised business leaders on peer performance and industry developments.

## ADDITIONAL EXPERIENCE

AXA ASIA, Hong Kong, **Regional CFO, Southeast Asia**, 2011-2015. Led multiple M&A transactions, including €500 million AXA-Tian Ping acquisition in 2013. Oversaw deal lifecycle, including identifying target companies, due diligence, valuation, negotiation, governance framework design, and post-deal integration. Managed financial performance across key Asian markets (Singapore, Malaysia, Indonesia, Thailand, the Philippines, and China).

PRUDENTIAL CORPORATION ASIA, Hong Kong, **Head of Financial Planning Analysis**, 2009-2011

CITI, New York, New York, **Vice President**, 2007-2009

FITCH RATINGS, New York, New York, **Finance Manager**, 2005-2007

SWISS RE / GUARDIAN LIFE, New York, New York, **Senior Financial Analyst**, 1999-2005

## EDUCATION

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UNIVERSITY OF PENNSYLVANIA, Philadelphia, Pennsylvania || **Certificate, Business Excellence**

COLUMBIA UNIVERSITY, New York, New York || **Certificate, Sustainability Studies**

UNIVERSITY OF GENEVA, Geneva, Switzerland || **Certificate, International Business**

UNIVERSITY OF ILLINOIS CHICAGO, Chicago, Illinois || **M.B.A.**

## CERTIFICATIONS

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*Associate, Life Management Institute (ALMI) - LOMA*  
*Ellig Group Board Academy*

## BOARD SERVICE

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*Development Chair, The Washington Ballet*  
*Nomination and Governance Chair, Illinois State Society*  
*Treasurer, Mission Square Foundation*  
*Finance Chair, Center of Public Administration and Services*

## AWARDS AND HONORS

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*Outstanding 50 Asian Americans in Business, 2025*  
*50 Women to Watch For Boards, 2025*

## LANGUAGES

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Fluent in Chinese.