

# Milo Johnston

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## SUMMARY

Results-oriented financial professional driving value with over a decade in investment banking. Expertise encompasses mergers and acquisitions, strategic financial advisory, and business development leadership. Proven ability to guide management teams towards achieving substantial revenue results through tailored client services and effective transaction execution. Cultivating lasting relationships has led to thriving partnerships, positioning firms for sustained success. Committed mentor fostering team growth through knowledge sharing and hands-on training. Prepared to leverage analytical acumen and market insights to enhance client engagements and contribute positively to overall firm objectives.

## EXPERIENCE

**Managing Director** June 2021 - Present  
XYZ Investment Partners Chicago, IL

Oversaw a highly talented team at a leading investment firm specializing in M&A activities. Provided strategic direction while ensuring compliance and operational efficiency in alignment with client expectations. Managed high-profile buy-side and sell-side transactions, enhancing business outcomes through effective team collaboration.

- Engineered robust financial strategies guiding clients through intricate negotiations.
- Elevated revenue through decisive business development efforts, effectively doubling client engagement.
- Coordinated with cross-functional teams to streamline due diligence processes and delivery timelines.
- Instilled a culture of mentorship, offering training sessions on advanced financial modeling techniques.
- Spearheaded initiatives that enhanced the firm's network, successfully converting prospects into long-term clients.
- Facilitated comprehensive financial analyses promoting strategic insight among executive stakeholders.

**Senior Vice President** March 2016 - May 2021  
LMN Financial Advisors Detroit, MI

Led challenging negotiations over various transactions, focusing on favorable outcomes for diverse clientele. Developed strong organizational strategies enhancing collaboration and communication across dedicated finance teams.

- Directed high-profile financial transactions, mentoring junior staff during intensive deal closings.
- Transformed internal operations to foster seamless workflows, accelerating project timeline by implementing technology-aided solution.
- Approached client presentations by simplifying complex financial theories, earning trust throughout engagements.
- Analyzed relevant market indicators providing significant insights into strategy effectiveness.
- Engaged stakeholders regularly ensuring alignment between financial goals and client expectations.
- Contributed significantly to performance enhancements winning commendations from clients and top management.

**Vice President** January 2013 - February 2016  
OPQ Capital Group New York, NY

Executed detailed assessments on investment opportunities in a competitive finance sector. Built solid relationships enhancing customer satisfaction and loyalty through targeted client interaction methods.

- Constructed comprehensive models predicting financial trends backed by statistical accuracy.
- Conducted rigorous analysis ensuring thorough evaluations of client propositions and strategic decisions.
- Led innovative workshops focused on developing core competencies in financial appraisals and risk assessments.
- Established efficient training routines bolstering junior analyst's skills in direct client dealings.
- Drove innovative business strategies via competitor analyses and data-driven recommendations.
- Prepared crucial documentation guaranteeing clarity, consistency, and regulatory adherence.

## LEADERSHIP & AWARDS

- Top Advisor Award at XYZ Investment Partners in 2022 for outstanding client service and remarkable deal closure rates.
- Recognized as Best Team Leader at LMN Financial Advisors in 2019 highlighting successful mentorship and performance enhancement initiatives.

## EDUCATION

**MBA** 2013  
University of Wisconsin-Madison GPA: 3.8 Madison, WI

**Coursework:** Strategic Management, Financial Analysis, Mergers and Acquisitions, Business Development

**Bachelor's Degree in Finance** 2011

**Coursework:** Corporate Finance, Investment Analysis, Risk Management, Financial Reporting

## CERTIFICATIONS

- FINRA Series 63 📅 2021
- FINRA Series 7 📅 2021
- FINRA Series 79 📅 2023

## TECHNICAL SKILLS

- **Financial Software:** Bloomberg Terminal, FactSet, Thomson Reuters
- **Project Management Tools:** Asana, Microsoft Project, Trello
- **Presentation Tools:** Microsoft PowerPoint, Google Slides, Prezi
- **Accounting Software:** QuickBooks, Oracle Financial Services, SAP
- **Data Analysis Tools:** Excel, R, Python
- **Communication Platforms:** Slack, Microsoft Teams, Zoom
- **CRM Systems:** Salesforce, HubSpot, Zoho
- **Statistical Tools:** Tableau, SPSS, SAS
- **Valuation Methodologies:** DCF, Comparable Company Analysis, Precedent Transactions
- **Compliance Standards:** GAAP, IFRS, SEC Regulations

## SKILLS

- Financial Analysis
- Team Leadership
- Regulatory Compliance
- Operational Efficiency
- Mergers and Acquisitions
- Strategic Planning
- Market Research
- Transaction Execution
- Business Development
- Data Analytics
- Valuation Techniques
- Due Diligence
- Client Relationship Management
- Risk Management
- Negotiation Strategies

## PROFESSIONAL AFFILIATIONS

- Member of the Chartered Financial Analyst (CFA) Institute since 2015, participating in networking events and ongoing education.
- Engage actively in the Association for Corporate Growth (ACG), contributing insights within panels on M&A strategies.

## LANGUAGES

- English (Native)
- Spanish (Intermediate)

## ADDITIONAL INFORMATION

**Work Status** : Authorized to work in United States. No sponsorship required.

## REFERENCES

AVAILABLE ON REQUEST