



SUMMARY OF QUALIFICATIONS

Extensive knowledge of governmental and nongovernmental organizations, grassroots and traditional media-based marketing, international business and cultural climates coupled with creative ideas, project management, and communication skills for product marketing, public relations applications and new product and business launch. A seasoned professional with board member service experience. Proven ability to work toward consensus under complex conditions. Strong analytical and planning skills, combined with the ability to coordinate more than one initiative at a time. Results oriented and multilingual (native Spanish speaker; fluent in English and working knowledge of Italian and Brazilian Portuguese).

PROFESSIONAL EXPERIENCE

A solid, 20+ year background in business marketing, project management and nonprofit initiatives advocacy in the U.S. and throughout Latin America. Broad and in-depth understanding of cultural values and socioeconomic dynamics of regional population. Previous business development and entrepreneurial expertise in telecom, high tech, financial services, small business ventures and the intelligence field. Engaged in a variety of technology investments conducting market analyses, valuations, due diligence, board service and technology start-up consulting projects regionally and internationally.

EMPLOYMENT HISTORY

Joseph Advisory Services, LLC - Managing Director/Founder

August 2006 to Present

El Paso, TX

www.josephadvisory.com

- Strategic advisory and asset allocation research and investment oversight for elite clientele
- Fifty million dollars under management with target to grow portfolio to \$100 million.
- Provides governance via board service on portfolio companies and advisory to funds via the Limited Partner Advisory Boards
- Fund formation and VC advisor to multiple universities, government entities and fortune 500 clients

Proficio Capital Management LLC -Managing Partner/Co-Founder

July 2009 to Present

El Paso, TX

www.josephadvisory.com

- An early-stage technology commercialization fund with offices in Texas, and California.
- Provides venture services and capital to a broad range of early-stage companies with strong commercial potential, including those companies licensing technology from government laboratories and universities.



- Served on boards of the following portfolio companies: idioma, Inc., FibeRio Technology Corporation, Respira Therapeutics, Inc., InView Technology Corporation, and Exagen Diagnostics Inc.

TPEP RCIC – Consultant and Executive Director

August 2006 to April 2009

El Paso, TX

- TransPecos/El Paso Regional Center of Innovation and Commercialization, Executive Director. The TPEP RCIC is a 501(c) 3 charged with facilitating technology transfer and new venture creation in the region. The organization fosters deal flow review, provides coaching, fundraising, interfaces with State Emerging Technology Fund, sponsors, entrepreneurs, investors and regulatory agencies.

Frontier of the Americas Program – Program Director

November 2002 to January 2005

El Paso, TX

- Created the laptop lending library whereby adults receive hands on technology training, and are allowed to “check out” laptops for home use.
- Proved vision, direction, and strategic planning for project with focus on institutionalization in the public school system.
- Collaborate with educators to create a curriculum that develops technology skills, as well as directed the program launch at elementary school level during pilot phase, and developed sustainability guidelines.
- Program is still in existence; applied for and received over \$100K in funding; currently operated by a nonprofit

La Frontera Foods, Inc. – President

March 2002 to April 2005

El Paso, TX & Southern New Mexico

- Maintained responsibility of financial management, vendor relations, employee training and management, marketing and promotions.
- Launched restaurant with only 25% of typical start-up capital versus the region’s industry average.
- Achieved break-even status within first 7 months of operation.
- Successfully sold restaurant as turn-key business with established clientele.

Capital IQ, Inc. – Manager of Special Projects

February 2001 to September 2001

New York, NY

- Capital IQ is a boutique investment bank with a mergers and acquisitions software development team – my hybrid experience in software development and the M&A process proved useful in developing client-centric service models
- Developed marketing collateral, sales pipeline optimization, and pricing analyses.



- Authored technical specifications and sales document for internal and external distribution, most notably the product's value propositions segmented by user groups, and assessed "behind-the-fire-wall" installations.
- Authored the company's disaster recovery plan, which proved useful during the 9-11 attacks.

First Mark Communications Latin America LLC – Director of New Markets

September 1999 to December 2001

Ft. Lauderdale, FL and Santiago, Chile

- Spearheaded business development, financial modeling and forecasting, market studies and data validation for license acquisitions, and partnerships across multiple markets.
- Formed part of executive team that raised \$50M in private equity and secured vendor financing commitments.
- Coordinated preoperative launches for Latin American sites in Argentina, Brazil, Chile, Colombia, Mexico, Peru and Venezuela, through partnerships with incumbents, media conglomerates, energy companies and financial institutions.
- Made presentations and prepared „road shows“ for partners and investors on acquisition strategies, financing and market entry points for broadband connectivity and online content delivery services.

Dalmex Business Technology Partners – President & Cofounder

August 1997 to September 1999

Cambridge, MA

- Developed and deployed applications for Fortune 500 client, major institution of higher learning, and start-up companies and oversaw RFP, needs analysis, client relationship management and overall sales cycle.
- Created CRM for an affinity program management company, human resources engines for Big Five consulting services firm and e-commerce transaction servers for insurance.
- Recognized by HISPANIC MAGAZINE as a leader in technology, and by MASS HIGH TECH as a "mover and innovator".
- Successfully sold Company in July 2009, to software development partner.

Abt Associates – Intern/Business Analyst

May 1994 to May 1995; June 1996 to August 1995

Cambridge, MA

- Interned while completing undergraduate studies
- Managed large data sets utilizing SAS mainframe programming tools
- Aided the work of the private sector practice primarily in banking and telecommunications
- Leveraged language fluency and data analytic skills and transitioned to manage high profile international work flow throughout Latin America
- Conducted first of its kind banking satisfaction, private wealth analysis, and technology adoption studies in Argentina, Brazil and Venezuela for elite U.S.-based banks

EDS/A.T. Kearney – Business Analyst

May 1995 to June 1996

Cambridge, MA

- Formed part of strategy-consulting team for satellite, wireless, and incumbent telecommunications clients.
- Managed input/output matrixes to establish price elasticity in the cellular market.
- Specialized in telecommunications regulatory analysis field and new market entry projects.

EDUCATION

PhD in International Business, Specialization in Strategy

May 2012

University of Texas at El Paso

- Dissertation: “The Effect of Incubator Participation in Developed Market Direct Entry by Emerging Market Firms”
- Expertise in emerging market firms, accelerators/incubators and knowledge transfer paradigms; University-level instructor in organizational behavior and strategic management/Capstone course.
- Scholarship and fellowship recipient
- Member of numerous academic societies including the Academy of Management, the Academy of International Business and the Strategic Management Society.
- Served as secretary and president for national organization of PhD students – The PhD Project

Accelerated Masters in Business Administration

May 2005

University of Texas at El Paso

- Completed advanced MBA program in 18 months while working full-time

Bachelor of Arts in Economics

May 1995

Brandeis University, Waltham, MA

- Received merit scholarship, excelled in area of concentration while also assuming leadership roles including the Hispanic student organization presidency, executive senator of the student senate, Hispanic student recruitment advocate, as well as a funded Undergraduate Research Fellow.

TEACHING EXPERIENCE

Entrepreneurship

Fall 2015; Fall 2017

Howard Payne University, El Paso, TX

- Taught two MBA-level courses on entrepreneurship which included review and study of the key variables found in successful entrepreneurial developments. The course covered the definition of the field, who is an entrepreneur and why, and how to embark in this endeavor, including accessing capital.



Strategic Management

Fall 2005; Spring 2006

University of Texas at El Paso, El Paso, TX

- Taught capstone strategy course for undergraduates. The course integrated accounting, business law, finance, human resources, production management, and marketing to solve management problems.

LEADERSHIP DEVELOPMENT

Latino Business Action Network/Stanford Latino Entrepreneurship Initiative, Board Member

October 2017 to Present

Palo Alto, CA

The mission of LBAN is to strengthen the United States by empowering Latino leaders to grow substantial firms that create jobs, develop leaders and spawn a new generation of companies. LBAN works closely with the Graduate School of Business at Stanford University to learn about Latino Owned Businesses (LOBs) in the United States, and to mentor, train and accelerate cohort participant ventures.

Society of Kauffman Fellow

July 2013 to Present

Palo Alto, CA

The Kauffman Fellowship is a highly sought-after two-year program dedicated exclusively to the world of innovation investing. Kauffman Fellows are selected from a worldwide pool of innovators and venture capitalist that share common goals and values that contribute to capital formation and venture development.

Cross Sector Leadership Fellow

April 2014 to Present

San Francisco, CA

With anchor partners the White House Office of Social Innovation and Civic Participation, Office of Personnel Management, and the Presidio Trust, the Cross Sector Leadership Fellows program will develop leaders that can engage and collaborate to greater effect across business, government and non-profit sectors. Cross Sector Leadership Fellows are selected based on their ability to impact their communities and the nation in areas of managerial and collaborative excellence across sectors of society.

COMMUNITY ACTIVITIES

UTEP Centennial Celebration – Marketing Committee

October 2012 to Present

El Paso, TX

The University of Texas at El Paso will be one hundred years old in 2014. A group of one hundred individuals are collectively involved to usher in the celebration in support of documenting the history of UTEP, supporting changing campus and a \$200M capital campaign, and celebrating the next one hundred years of UTEP.



Gideons International

October 2011 to Present

El Paso, TX

- The Gideons International is an interdenominational association of Christian business and professional men who are members of Protestant/evangelical churches.
- Members are dedicated to personal witnessing and the distribution of Bibles in more than 190 countries around the world.
- Active in the local Gideons International chapter and serve as liaison to the area prisons and as a volunteer prison minister.

Rotary International - Member

August 2010 to Present

El Paso, TX

- Rotary's main objective is service — in the community, in the workplace, and around the globe.
- The 1.2 million Rotarians who make up more than 34,000 Rotary clubs in nearly every country in the world share a dedication to the ideal of Service Above Self.
- Active in the Education and Literacy Committee

The Paso del Norte Group –Executive Committee

January 2008 to January 2011

El Paso, TX

- The PDN Group is a tri-lateral civic, economic and educational foundation dedicated to the region's advancement. The organization has nearly 400 members from Cd. Juarez, Chi. Mex., El Paso, TX and Las Cruces, NM, representing leaders across all civic, business, educational, and political spectrums. I participate in crafting the strategic direction of the organization. Special emphasis in recruiting young leaders.

911 District Board – Board of Managers, El Paso County Appointee

August 2007 to July 2011

El Paso, TX

- Appointed by the County of El Paso as a member of the emergency response system board of managers. A volunteer position that oversees a \$8M budget that covers emergency preparedness and communications systems of El Paso County and the municipalities within it.

Tigua Inc. – Founding Board Member

January 2008 to August 2009

El Paso, TX

- A non-tribal representative appointed to the board of the Ysleta del Sur Pueblo (Tigua's) private sector, economic development organization responsible for a \$5M+ budget that covers economic development and investment initiatives.