

Joe Kane

Primarily based in Northeast Ohio

BIO SNAPSHOT

- Began career, from humble lower working-class origins, as an industrial engineer and cost accountant at Kent Watersports, an outdoor sporting gear manufacturer.
- Progressed laterally, based on merit and work ethic, in corporate finance and business development at publicly-traded companies, Texas Industries (TXI) and Coca-Cola (KO).
- Earned an MBA and advanced into investment management (private equity and small hedge fund), Wall Street, and Silicon Valley.
- Co-founded a boutique investment banking firm. And, along the way, helped form and lead a nonprofit bicycling company.

TECHNICAL SKILLS

- Finance: Spreadsheet modeling (LBO, M&A, Dynamic 3-Statement, DCF)
- Software: MS Office, LibreOffice, Salesforce.com, Zoho Suite, Tableau, CapIQ, ERP (SAP, IBM), Python, WordPress, QuickBooks, Scribus
- Operating Systems: Microsoft Windows, Linux

SELECT EXPERIENCE

Coventry League,

West Coast &
Northeast OH.

*Managing Director &
Co-founder,*
2011 - Present

As a boutique investment bank, the firm provides buy-side and sell-side mergers and acquisitions (M&A), fractional CFO and corporate development, and strategic advisory services.

- Responsible for client relationships, including attracting and retaining new clients and strengthening current relationships.
- Lead and support financial and valuation analysis; resolve modeling, due diligence, and negotiation issues; and, ensure client deliverables and performance.
- Oversee administrative tasks including P&L, technology (CRM, website, IT), professional service providers, and contractors.

Coventry League LP,

New York, San
Francisco, Cleveland.
Portfolio Manager,
2003 - 2010

- Discretionary investing of mostly liquid investments via hedge fund-like format using multiple strategies.
- Coded Excel models and macros, leveraged Bloomberg data, and programmed scripts in Python.
- Enabled partners to achieve stellar results of more than 40% annualized without use of leverage over one business cycle, including a great recession (Top 1% of competition).
- Peak assets under management (AUM), ~\$25M.

Wedbush Morgan,

San Francisco, CA.
Senior Associate,
2005 - 2006

Joined the newly created San Francisco office to execute an existing pipeline of transactions, assist with marketing efforts, and train new staff. Our focus was tech-enabled and software-as-a-service (SaaS), but not exclusively.

SG Cowen | Société Générale Group,

New York, NY.
Associate,
2000 - 2003

Formerly a unit of Société Générale Group of Paris, France. My role involved debt capital markets, and sales and trading desk efforts. Team focused on bonds incorporating senior, subordinated, and equity-equivalent tranches.

Huron Capital,

Detroit, MI.
Summer Associate,
2001

The firm has raised over \$1.8 billion of equity through six private equity funds and acquired stakes in 150+ companies. I supported the firm when it consisted of three investment professionals managing its inaugural fund of \$72 million.

The Coca-Cola Company,

Dallas, TX.
Financial Analyst,
1997 - 1999

Performed financial planning and analysis (FP&A) and business development for non-carbonated beverages in Southwest USA.

HOBBIES

Intrigued? Peruse my Switzerland-based ~~Big~~ Brilliant Beautiful Blog: CounterIt.ch