

Charles Hubbard Partner



Select Executive Experience

Hubbard & Associates, LLC (2013-2021)
Managing Partner

**Castle Connolly Private Health Partners
(2015-2017)**

Interim CFO & CAO

Tatum (2010-2013)

CFO Partner

Merrill Lynch (2004-2009)

Global Projects Manager

Credit Agricole Indosuez (2001-2003)

Senior Restructuring Executive

KM Management LLC (2000-2001)

Head of Operations & Finance

UBS AG US Private Banking (1993-2000)

CFO, CAO, Head of Operations

Core Competencies

CFO

Senior Management Consultant

Interim Financial Executive

U.S. and International Financial Service

Start-ups

Private Equity

Banking Operations

Risk Management

Corporate Restructuring

Investment Management & Treasury Services

Cash Management

Commercial & Private Bank Liquidity & Debt
Financing

Project Management

Strategic Planning

New Product Development

Executive Profile

Charles Hubbard is a partner in the New York office of SeatonHill. He has over 30 years of diversified senior financial management, operations, and administration experience with top-tier financial corporations including Merrill Lynch, Credit Agricole, UBS and HSBC. Charles also helped found and build the infrastructure of a sophisticated start-up registered investment advisor and hedge fund entity. His successful projects demonstrate a high level of expertise in strategic planning, regulatory compliance, profitable business development, restructuring, and treasury and risk management. In addition to autonomous engagements in his own practice, Charles worked as an independent partner with prominent consulting firms such as Business Talent Group and Tatum on financial management and CFO assignments. Prior to SeatonHill Charles was the managing partner of Hubbard and Associates where he assisted CFOs to fulfill short and mid-term initiatives requiring integration of strategic goals with financial controls. The firm focused on reporting, due diligence, risk assessment, benchmarking, and performance measurement necessary for optimizing disparate organizational entities.

Education & Certifications

MBA, Finance and Operations

Wharton School of Business, University of Pennsylvania

Master of Chemical Engineering

Rice University

BA, Chemical Engineering

Rice University

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For more information contact:

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Our partners have deep experience across multiple industries, and can quickly integrate into your organization to provide the insights you need to succeed in today's marketplace.

Charles Hubbard
Partner



Key Experience

Castle Connolly Private Health Partners, LLC: As Interim CFO for Castle Connolly Private Health Partners, a joint venture providing conversion and support services to concierge practice physicians, Charles developed the strategic business plan for the initial capital fund raising. He set up and supervised all accounting, billing, financial forecasting, budgeting, A/P and A/R systems and procedures.

Tatum: As CFO Partner for this national consultancy, Charles served as interim CFO of CIFC, a Charlesbank Capital Partners' portfolio company with \$6 billion CLOs under management. He led a team that restated 3 years of prior financial statements for a favorable Deloitte audit opinion, authored MD&As for management and the BoD, developed new financial reporting and control processes, integrated \$2 billion in acquired AUM, filed 10K and 10Q reports, and oversaw the financial preparation of a 742-page SEC proxy filing for merger with a public \$9 billion asset management firm.

Merrill Lynch: As the Global Projects Manager for the Treasurer and Office of the CFO, Charles led multi-functional teams in size from 2 to 200 associates that conceived, developed and implemented multiple financing, M&A, restructuring, liquidity, collateral allocation, cash management, and revenue enhancement projects worldwide. As a notable accomplishment, Charles directed the joint Treasury Services (cash management and commercial lending) transition team that melded the Merrill Lynch and Bank of America operations to maximize middle market penetration and efficiencies.

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