

# Charles Hubbard

SeatonHill Partner

## 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.

**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.

## EDUCATION

**MBA, Finance and Operations** • Wharton School of Business, University of Pennsylvania, Philadelphia, Pennsylvania

**Master of Chemical Engineering** • Rice University, Houston, Texas

**BA, Chemical Engineering** • Rice University, Houston, Texas



## 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

## CONTACT

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