

## **The Professional Development Institute**

Life Sciences, Management Consulting & Advanced Skills Training  
R&D, Architects of Harvard University Global System & Management Road Maps  
Toll Free: 1-800-Harvard (427-8273), +1 (819) 772-7777 (Local in Ottawa, Canada)



### ***Dr. Michael Rees***

**Senior Partner**

**Quantitative Analysis**

**Risk Assessment and Mitigation**

**Strategic and Financial Modeling**

A citizen of Canada and the United Kingdom, Dr. Michael Rees is recognized throughout Europe and North America for his cutting-edge expertise in complex risk assessment and mitigation, quantitative methods, and strategic and financial modeling. Greatly appreciated for his outstanding abilities in teaching, he combines a sound practical experience with a distinguished education in mathematics and business administration.

Dr. Rees currently also acts as European Director of Training and Consulting for Palisade Corporation. He is an Invited lecturer on Real Options on the Wilmott Certificate in Quantitative Finance program. His experience includes Vice President of J.P. Morgan in the UK, Principal at Mercer Management Consulting in Germany and the UK, and Manager at Braxton Associates (now Deloitte and Touche) in Germany.

Michael holds a PhD in Mathematics from Oxford University, an MBA with Distinction from INSEAD in France. He is Associate Fellow of the Institute of Mathematics and its Applications (AFIMA).

#### **EDUCATION**

- **Certificate in Quantitative Finance:** won Wilmott Award, graduated top of class, UK, 2003
- **MBA:** Distinction, INSEAD, France, 1992
- **PhD:** Mathematics, Oxford University, UK, 1985-88
  - Designed and programmed numerical algorithms for computer simulation
- **1st Class Honors:** Mathematics, Oxford University, UK, 1982-85
- **4 A-levels:** A grades, **2 S-levels:** Distinctions, UK, 1980-82

#### **PROFESSIONAL EXPERIENCE**

**Sr. Consultant & Trainer:** Quantitative Analysis & Financial Modeling, UK, 2002-Present

- Conducted consulting engagements for wide range of clients, including: major corporations, private equity firms, fund managers, strategy consultants, and risk management consultants (e.g. financial modeling, business case analyses, cost budgeting and pricing strategy, valuation modeling, securitization analysis, negotiation support, due diligence and post-transaction planning, design of incentive structures, and aligning strategy with financing)
- Acted as Director of Training and Consulting for Palisade Corporation
- Acted as instructor in financial modeling to several City institutions on behalf of 7City Learning
- Invited lecturer on Real Options on the Wilmott Certificate in Quantitative Finance program
- **Recent publications**
  - “Mortgage Lending Risk Analysis” (Risk International, 2004 Yearbook);
  - “Shall the Twain Ever Meet?” (Wilmott Magazine, May 2005)

### **Vice President, J.P. Morgan (Equity Analyst), UK, 2000-2002**

- Built coverage of Scandinavian incumbent telecommunications operators
- Published reports, developed financial forecasts, conducted valuations, and advised clients
- Ranked as top City analyst by all companies under direct coverage
- Received vote in Institutional Investor 2002 survey

### **Principal, Mercer Management Consulting, Germany and UK, 1996-2000**

- Developed and delivered large and complex strategy, organization, and change projects e.g.
  - Business planning, market entry and growth strategies, market segmentation, competitive analysis, customer-driven growth strategies, partner and acquisition assessments
  - Turnarounds, cost reduction, performance measurement and improvement, strategic cost management, outsourcing, organization design and restructuring, process re-engineering, and change management
- Managed international teams of 4-10 consulting staff and multiple client teams (up to 50 staff)
- Major contributor to staff recruiting, training and development e.g.
  - Participated in graduate, MBA, and PhD recruiting
  - Instructed on global training programs,
  - Responsible for all local training programs
  - Mentored and demonstrated best practices in project and team management.
- Focused for 3 years on telecommunications services (incumbent and alternative operators), printed media, publishing, paper and software. Also worked in the automotive and rail sectors

### **Manager, Braxton Associates (now Deloitte and Touche), Germany, 1995**

- Managed a range of strategy consulting projects in many sectors e.g. telecoms, manufacturing, engineering, pharmaceuticals, chemicals, health-care, and food

### **Senior Associate, Braxton Associates (now Deloitte and Touche), Germany, 1993-94**

- Strategic management consultant; key member of start-up team of Braxton Germany
- Business Analyst, Braxton Associates (now Deloitte and Touche), UK, 1989-91
- Conducted analytic and research work to address clients' strategic issues

### **LANGUAGES**

- English (Mother tongue)
- German (Fluent): holds "Grosses Deutsches Sprachdiplom"
- French (Fluent)
- Spanish (Foundation level, under study)

### **OTHER**

- Associate Fellow of the Institute of Mathematics and its Applications (AFIMA)
- Interests: swimming, fitness training, mountain walking, martial arts (President of university club), classical guitar, languages, travel, table tennis (Captain of college team), ballroom dancing.