

CARLA DEARING

LEADERSHIP ~ TECHNOLOGY ~ INNOVATION ~ RESULTS

Seasoned fintech executive with boundless passion for strategy and execution, especially:

- identifying people's talent and igniting their passion for excellence;
- utilizing new technologies to power products and engagement;
- connecting through social media and digital marketing; and
- managing with an unflagging focus on revenue growth and profitability.

PROFESSIONAL EXPERIENCE

- May 2014 to present** **Founding CEO of fintech early-stage startup, Sum180, and Head of Product for fintech growth-stage FlexWage Solutions LLC, which acquired Sum180 in April, 2019**
Co-founder of fintech startup, Sum180, a mobile employee financial wellness service, key clients include KFC Foundation for KFC's 90,000 employees and Yum Brands (pilot). Lead investor was IMC, see below. FlexWage Solutions is a leading provider of employer-sponsored early wage access and other pay solutions for employees, key clients include Denny's, McDonalds, Alliance Data, RWJBarnabus Health Care, Future Care. Partners include: Fiserv, Visa, Money Network, Green Dot and others.
- July 2011 to December 2017** **Managing Director and CEO International Marketing Concepts, LLC ("IMC")**
Led the turnaround of this highly profitable 20-year old agency providing world-class strategy, digital marketing, partner development and deal management services for clients such as AT&T, L'Oréal, Kimberly-Clark, SC Johnson and other iconic brands in the U.S. Lead investor in Sum180, LLC.
- January 2009 to June 2011** **AVP, Strategic Initiatives, Office of Health Affairs University of Louisville, Health Sciences Center**
Responsible for strategy development and special projects regarding health sciences strategy and capital growth, technology and finance for Medical School, UofL Hospital and physicians' practices.
- March 2000 to September 2008** **President & CEO Community Foundations of America, Inc.**
Founding CEO of nonprofit technology and professional services company targeting community foundations, with grant support from W.K. Kellogg Foundation, David and Lucille Packard Foundation, Charles Stewart Mott Foundation, Ford Foundation, Skoll Foundation and 115 community foundations nationwide. Recognized for innovation in the areas of foundation and scholarship technology, donor marketing through relationships with financial institutions and strategies for demonstrating accountability through impact technology. Co-founder of Philanthromedia.org, a nationally- distributed blog, and thought leader on donor engagement and the social capital marketplace.
- 1992 - 2000** **President & CEO Investors Capital Services, Inc. (ICS), New York, acquired by State Street Bank in 2007**
Co-founded this registered broker/dealer providing fund administration services for institutional investment management firms and an advisory firm offering consulting and financial advisory services to other financial institutions, domestic and international. With \$8 billion in assets under administration, ICS was acquired in 1998 by Investors Bank and Trust Company of Boston, which was subsequently acquired by State Street Bank & Trust Company in 2007.

- 1988 - 1992** **Vice President/Associate**
Morgan Stanley, New York, Geneva and London
Responsibilities included new product and market development and sales for Morgan Stanley Capital International (MSCI), the source of leading global performance benchmarks used by financial institutions around the world, including 98 percent of the pension managers in the U.S. at the time.
- 1986 - 1988** **Lending Officer/Associate**
American National Bank & Trust Company, Chicago
Completed training and served as banking officer for clients of this middle market bank, which later was acquired by NBD and later JPMorgan Chase.
- 1984 - 1986** **Analyst**
Morgan Stanley, New York
Responsibilities included analysis and new product and market development support as an internal consultant to divisions such as the international derivatives department, the trust company and The Pierpont Funds, a mutual fund for high net worth investors, then a joint venture with JPMorgan.

EDUCATION

- 1988** **Masters in Business Administration, University of Chicago**
- 1984** **Bachelor of Arts, University of Michigan**
Phi Beta Kappa, Varsity Volleyball

BOARDS/VOLUNTEER ACTIVITY

- Jan 2019 to present** **Chair, Wild Accelerator Inc.**, regional micro-accelerator for female founders
- Jan 2018 to present** **Executive Adviser, Louisville Urban League Sports and Learning Complex**
- 2006 to 2015, and**
2016 to present **Board member, former Chair, Jefferson Community and Technical College Foundation Board,**
Louisville, KY
- 2016 to 2018** **Board member, Greater Louisville, Inc.**, Louisville, KY, Chamber of Commerce
- 2003 to present** **Board member, IMC, Louisville, KY**
- 2003 to present** **Investment committee member, C.E. & S. Foundation, Inc.**, Louisville, KY
- 2014 to 2015** **Board of Overseers, University of Louisville, Louisville, KY**

PUBLICATIONS/ACCREDITATIONS

- 2011 - present** **Blogger, speaker, currently at www.community.SUM180.com**
- 2006 to 2008** **Contributing writer, Philanthromedia.org, www.philanthromedia.org**
- 2002 - 2006** **Power and Influence Top 50, Nonprofit Times, five-time recipient**
- July, 2006** **Philanthropy News Digest, "Bringing More Buffetts to the Table"**
- February, 2007** **Worth, "The Schwabification of Philanthropy"**
- 1992 to 2008** **Securities industry licenses previously held: General securities principal (Series 24), financial operations principal (27), securities representative (7,63)**

INTERESTS/OTHER

Travel, gourmet food, reading, sports, triathlete (Ironman). Flexible to travel and/or relocate.