



David Winterstein
Managing Partner / Executive Coach
Trans-Form LLC

Business Experience:

- 30+ years of experience leading organizational change initiatives
- Strong track record both in successful business start-up and also in achieving ongoing improvement in cost efficiency, organizational effectiveness, operating control and staff capability
- In addition to over 20 years leading the Trans-Form LLC consultancy; held leadership positions with Fannie Mae, C12 Capital Management, and Salomon Brothers

Coaching Credentials:

- Certified by the International Coaching Federation (ICF) as a Professional Certified Coach (PCC)
- Certified Professional with the DISC toolset: Emotional Quotient (EQ), Behavioral Analyst (CPBA) and Motivator Analyst (CPMA)
- Professional Coach Training completed with Philosophy IB, LLP, Leadership Coaching for Organizational Performance

Coaching Focus Areas:

- Leadership Coaching for high performing, high potential individuals
- Blind-spot discovery - performance optimization through self-awareness
- New role/team assimilation
- Trusted Advisor to C-Suite
- Career cross-roads navigation – alignment of work and life aspirations

Organizational Change Initiatives:

- **Organization Effectiveness** – Executive Coach and trusted advisor to the C-Suite of Private Equity firm. Focus areas included Leadership acumen, Business Strategy and establishing a Performance oriented culture.
- **Hedge Fund Start-Up/COO** - Directed the start-up for \$13 billion Investment Management firm including selection of Prime Brokers, Fund Administrator, Payroll/Benefits provider; established corporate banking relationships, negotiated and executed all vendor and employee contracts, instituted Compliance and Ethics Policies
- **Outsourcing** – Led the Due Diligence phase for the outsourcing of Operations & Technology roles to the newly formed FIS Derivatives Utility; also SME for contract negotiation and governance design
- **Off/Near-Shoring** – Created low-cost capacity and reduced staff concentration risk through the deployment of Operations, Finance and Technology positions. Managed programs from business-case development through implementation.
- **Governance** - Led the rebuilding of the governance function for outsourced Operations & Technology relationships with contract values of \$1.4 billion
- **Post-Merger Integration** – Successfully led teams through all aspects of integration including: due diligence, transition planning, people and process selection, change of control and achievement of synergy targets.