



# VALUESCOPE

Measure | Defend | Create

**Jason Wainwright, CFA, ABD**  
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## OVERVIEW

Mr. Wainwright's prior experience includes serving in finance and strategy positions for one of the nation's leading aerospace and technology companies and serving as a content specialist for a leading provider of preparatory texts for advanced financial designations. In his current position, Mr. Wainwright advises clients on mergers and acquisition opportunities, assists business owners and management teams on business plans, conducts valuations of various assets and business, and provides financial consulting services to businesses. Mr. Wainwright has significant education in the area of finance.

## EMPLOYMENT HISTORY

**Feb 2014 – Present**

**Senior Manager**

**ValueScope, Inc.**

*Southlake, TX*

Mr. Wainwright is currently a Senior Manager at ValueScope, Inc. In this position, he has managed and worked on a number of varied projects for firms across multiple industries. Mr. Wainwright's work has included financial modeling and simulation, sell-side and buy-side transaction advisory, analysis of distressed debt investments, business valuation, development of business plans, valuation of complex securities, litigation support, econometric and statistical analysis, and corporate financial consulting including projects on value enhancement and capital structure optimization. Additionally, Mr. Wainwright's work in this position has included employment analyses, employment compensation analyses, and long-term incentive plan structuring and modeling.

**2013 – Feb 2014**

**Strategic Senior Planning Analyst**

**Lockheed Martin Missiles and Fire Control**

*Grand Prairie, TX*

Immediately prior to joining ValueScope, Mr. Wainwright served as a senior analyst within Lockheed Martin's Strategic Planning group, focusing on the analysis of energy market opportunities. As part of this, he qualified and analyzed potential M&A, partnership, and investment opportunities. This effort included developing pro-forma financial statements and discounted cash flow (DCF) valuations, as well as conducting due diligence of prospective targets.

Mr. Wainwright prepared management presentations, recommendations, and also conducted market forecasts and strategic business reviews. He researched and prepared competitive intelligence and assisted in development of Strategic Plans.

**2011 – 2013**

**Senior Financial Analyst**

**Lockheed Martin Missiles and Fire Control**

*Grand Prairie, TX*

Mr. Wainwright served as the financial analyst for the Energy Program, where his work focused on the analysis of potential M&A and partnership opportunities. This included financial modeling, investment analysis, and the preparation and presentation of recommendations.

## EMPLOYMENT HISTORY

**2008 - 2011**

***Content Specialist***Fort

Worth,

**Kaplan Schweser**

TX

Mr. Wainwright was a contributing author of Kaplan Schweser preparatory materials for professional financial designations including the Chartered Financial Analyst, Financial Risk Manager, and Chartered Alternative Investment Analyst. He wrote concise and accurate preparatory texts for topics including but not limited to financial statement analysis, equity analysis, quantitative investment analysis, private equity, risk management, and alternative investments.

**2005 - 2008**

***Contracts Negotiator***

**Lockheed Martin Missiles and Fire Control**

*Grand Prairie, TX*

Mr. Wainwright served as the Deputy Director of Contracts for the NetFires, LLC, a Limited Liability Corporation jointly owned by Lockheed Martin and Raytheon Company. He negotiated and administered Government contracts and managed the contractual relationship with the Government.

## CONSULTING EXPERIENCE

**2011 - 2013**

***Contractor***

**Expert Witness and Litigation Support**

In addition to his employment at Lockheed Martin, from 2011 through 2013, Mr. Wainwright engaged in expert witness and litigation support for a number of cases. This effort included preparing complex analyses, valuations, and estimates of damages relating to a variety of matters.

**2011 - 2013**

***Contractor***

**Kaplan Schweser**

From 2011 through 2013, Mr. Wainwright served on a contractor basis as a contributing author of Kaplan Schweser preparatory materials for professional finance designations including the Chartered Financial Analyst and Chartered Alternative Investment Analyst.

## EDUCATION

Ph.D. Course Work in Finance - 2009 - 2016

ABD; Completed all course work and written and oral comprehensive examinations  
University of Texas at Arlington, Arlington, Texas

MS in Quantitative Finance - 2008

University of Texas at Arlington, Arlington, Texas

BBA in Economics/Finance - 2005

Texas Wesleyan University, Fort Worth, Texas



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## **ACCREDITATIONS AND DESIGNATIONS AWARDED**

CFA - Chartered Financial Analyst (CFA Institute)

## **PROFESSIONAL AFFILIATIONS**

- CFA Institute
- CFA Society of Dallas-Fort Worth
- Association for Corporate Growth (ACG) Dallas/Fort Worth