

ANDREW D. WETHERN

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SUMMARY

A driven and highly versatile financial services executive with extensive experience in financial modeling and analysis, policy development, presentations and public speaking, project management, and procurement and purchasing. Excels at leading innovative teams while leveraging dynamic leadership skills and industry knowledge to empower mutually beneficial outcomes. Works with all levels of internal and external management to ensure corporate and client buy-in across the mortgage and financial consulting functions/sectors. Proven success in building solid business practices while driving economic stability, growth, and revenue.

- Compliance Oversight
- Staff Mentoring
- Strategic Planning
- Risk Management
- Contract Negotiations
- KPI Development

EXPERIENCE

PHH/OCWEN, West Palm Beach, Florida

Manager, Loan Qualification Group, and Licensed Mortgage Loan Officer, 2019-2022

Assumed control of downturned enterprise and enacted 90-day plan to overhaul operations. Continued redesign efforts as COVID sent workforce to remote working status. Championed leadership and oversight for continuous pipeline (500-plus on any given day) of mortgage clients with loan values ranging from \$30,000 to \$750,000. Presided over origination of loans while working cross-collaboratively with senior-level credit officers on complex loan applications.

Educated and coached customers on variety of loan products and available credit options to promote valuable decision making. Negotiated terms of mortgage loans and qualified prospective borrowers into conforming loan products. Finalized loan origination process, including ordering credit reports, appraisals, and preliminary title reports.

- Strategized ways to exceed customer expectations by finding creative solutions to problems.
- Enlarged overall team footprint from 11 to 50-plus specialists within eight months. Governed additional eight setup team members within U.S. as well as 30-plus team members offshore.
- Executed and expedited collection of all documentation, verifications, and application submittals to underwriting.
- Authored and deployed innovative strategies while instituting plans to achieve ambitious operational objectives.
- Increased team throughput from 299 qualifications in January to 499 in February to 1,000-plus in March.
- Overhauled entire loan process, moving from chasing documents to upfront processing.
- Fostered further refinements in processes and additional duties while keeping up with exceptional demand in 2021, moving most loans ever in single month (1,603).
- Contributed to promotions of 20-plus staff to new positions.

BAYSHORE/SHEPHERD KAPLAN/ASSET STRATEGY CONSULTANTS, West Palm Beach, Florida

Director of Financial Reporting & Research, Senior Consultant, 2009-2018

Managed all aspects of client interaction, including presenting at quarterly investment committee meetings and handling client requests between meetings. Led and managed production of client deliverables, including quarterly investment reports on proprietary reporting system, quarterly market updates, asset allocation presentations, portfolio rebalances, manager search books, and RFP responses. Created and delivered white papers, client education pieces, and client memorandums. Led manager research and due diligence for West Palm Beach office clients. Achieved expertise in ESG investing protocols as well as SRI methodologies, including negative screening, positive screening, and impact investing and how to deploy across all asset classes.

Led launch of multiple investment strategies/products with investment management firms, including genesis of three mutual funds. Tapped as regular speaker at multiple institutional investor conference series. Worked with clients ranging from \$2.5 million in assets to \$1 billion (largest client). Conducted investment research, reporting, recommendations, and delivery for all clients to investment committees and boards of directors. Fostered decisions regarding investment strategies, asset allocation, and manager selection.

- Increased office AUM by \$700 million during employment.
- Oversaw key decisions regarding investment strategy, asset allocation, and manager selection, producing top-decile portfolios for clients over spans of five, three, and one year(s).
- Assisted clients in beating performances of Harvard, Yale, and every other metric for all periods from 2013 to 2018.
- Pinpointed concerns and areas requiring improvement while establishing processes to remedy concerns.

ADDITIONAL EXPERIENCE

BP SOLAR, Frederick, Maryland, **Facility Project Engineer**, 2007-2009. Named project owner of \$55 million facility expansion project, guiding design and construction of 300,000 square feet of production space, with potential for LEED certification (Project ultimately reached 90% complete pre-cancellation by leadership and later demolished as operations wound down at site.).

ANN'S HOUSE OF NUTS, Robersonville, North Carolina, **Projects Engineer**, 2006-2007. Identified areas of loss/waste and developed and implemented solutions with minimum impact to production. Managed outside resources as necessary to complete scope of work assigned. Worked with ownership and plant management on development of new processes and technologies.

NEW WORLD PASTA, Winchester, Virginia, **Plant Project Engineer**, 2005-2006. Oversaw all aspects of plant capital and maintenance projects, outside contractor services, and internal process improvement. Implemented inventory barcode system to automatically enter production items or inbound shipments into JDE environment.

TREX COMPANY, INC., Winchester, Virginia, **Project Engineer**, 2002-2005. Installed first next-gen extrusion line in Fernley, Nevada. Managed all capital improvements at Fernley, Nevada plant, starting in March 2004. Installed first-of-its-kind product reclaim system at Winchester site (entered production in September 2004). Forged partnership with Home Depot and led ensuing product launch in May 2004. Facilitated startup of Winchester plastic recycling washline with existing engineer. Brought line up to meet performance expectations despite change in raw material. Redesigned Winchester washline water system operation to reduce manual supervision.

INTEL CORPORATION, Hillsboro, Oregon, **Mechanical Project Engineer**, 2000-2002. Managed scope, schedule, and budget for tool install project (\$80 million) and co-managed large base-build project (\$650 million). Oversaw budget for construction of new Class 100 cleanroom microprocessor fabrication facility. Facilitated mechanical design of HVAC, process exhaust, plumbing, and fire protection/safety showers and drove completion to meet accelerated schedule. Named single point of contact for communication between management, design, and construction teams for field coordination of design issues. Wrote and championed white papers for changes in project/site specifications as well as changes to plan of record design.

EDUCATION

WALDEN UNIVERSITY, Minneapolis, Minnesota, **M.B.A.**

LEHIGH UNIVERSITY, Bethlehem, Pennsylvania, **B.S., Mechanical Engineering**

COMPUTER SKILLS

MS Office Suite, Business Analytics (Multiple platforms), Salesforce, SAP, Oracle, JDE

LANGUAGES

Fluent in Spanish.