



## JULIANA IAROSSI, EDB

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Columbia, SC

Ponte Vedra Beach, FL

Munich, Germany

### EDUCATION

#### **Georgia State University: Executive Doctorate in Business (2012)**

Dissertation: "Path Building in Emerging Entrepreneurial Firms: An Investigation of Networks in the Making"  
(Committee: Mark Keil, Lars Mathiassen and Benjamin M. Oviatt)

#### **University of Texas at Arlington: M.B.A. – Finance (1986)**

Graduate Teaching Assistant: Department of Management (Kenneth Wheeler)

#### **Virginia Tech: B.S. Materials Engineering (1982)**

### UNIVERSITY POSITIONS

#### **University of South Carolina, Moore School of Business – Department of Management (Fall 2013 - Present)**

Clinical Assistant Professor, Entrepreneurship

Teaching courses in emerging ventures, entrepreneurial finance, strategy and corporate finance:

- MGMT 473 Developing and Launching New Ventures (2013-Present)
- MGMT 474 Executing Strategy in New Ventures (New Course Spring 2017)
- MGMT 478 Strategic Management (2015-2016)
- ENCP 735 Developing and Launching New Ventures in Science and Technology (New Course Fall 2017)
- FINA 760 Financial Policies (2014)
- MGMT 780/FINA780 Entrepreneurial Finance & the Dynamics of Emerging Ventures (2014-Present)

Sourcing and overseeing student projects with 10-15 emerging ventures located in the Southeast each semester.

#### **NSF I-Corp Site for Entrepreneurship - Columbia SC (Fall 2017 – Present)**

Co Director

### BUSINESS EXPERIENCE

#### **Coalesce Capital, LLC – Ponte Vedra, FL (2008-Present)**

Founder/Managing Member

Founded to help leadership teams in the US and Europe build viable and durable organizations by providing strategic resources, funding and advice, workshops, training and research for successful emergence, turnaround, transformation or accelerated growth.

#### **Bridge Capital Associates, Inc. – Atlanta, GA (2008 –2009; 2012)**

Branch Office Manager/ Registered Representative

Supported investment banking/fundraising activities for clients of Coalesce Capital, LLC

#### **Bear Stearns & Co, Inc. – Atlanta, GA (2005 –2006)**

Managing Director/ Branch Office Manager - Private Client Services

Responsible for management, compliance and regulatory oversight of Atlanta branch which generated \$30MM in annual revenues from high net worth individuals and middle market institutional clients through 44 brokers/portfolio managers and 42 sales assistants and administrative staff. Improved operations, oversight and business development

activities by (1) instituting monthly meetings with administrative staff and weekly sales meetings with Brokers/Portfolio Managers to provide education on industry, product and compliance/ regulatory issues and to identify business development opportunities, operational and HR issues, (2) instituting morning meetings with compliance and operations managers to review branch transactions and develop strategies to improve compliance and operational efficiency, (3) establishing a transition team to assist newly hired brokers transferring business to Bear Stearns and (4) reorganizing support staff to align skills and experience with customer and Broker needs. As a result of these efforts, branch received an 'excellent' review from Internal Audit (March 2006)

**Citigroup – Atlanta, GA (2004 –2005)**

Vice President/Senior Transactor & Team Leader – Private Client Lending

Responsible for establishment and management of new Atlanta based team to provide specialized lending (>\$20MM) to ultra high net worth clients of Smith Barney in the Southern Division (188 branches/11 states), including education of Financial Consultants and Branch Managers, identification of financing opportunities and negotiation of credit terms with clients, marketing of interest rate derivative products and recruiting of members of the lending team.

**Morgan Stanley- Atlanta, GA (2000 –2004)**

Vice President/ Wealth Advisor - Private Wealth Management/Investment Advisor Services

**Bank of America – Atlanta, GA (1994 –2000)**

Senior Vice President – Private Bank

Responsible for origination and management of loan portfolio and investments for ultra high net worth individuals, including marketing investment, credit and fiduciary services, due diligence for client corporate acquisitions, negotiation of credit agreements. Areas of specialization included acquisition financing (senior and subordinated debt) for complex businesses.

**First Union – Atlanta, GA (1990 – 1992)**

Vice President & Manager – Internal Loan Review & Credit Standards for Georgia

Workout Specialist – Commercial, Real Estate and Private Bank

**BANK ONE/ Bonnet Resources/ MBank – Dallas, TX (1986 –1990)**

Workout Specialist – Structured Finance, Middle Market Lending, Private Bank

Assist Vice President/ Co-Manager - Commercial Bank Training Program

Corporate Banking Officer – Middle Market Lending

**Eagle Engineering, Inc. - Houston, TX (1983)**

Materials Engineer – Research for FDA and NASA subcontractors

**Miller & Lents, Ltd. – Houston, TX (1982 –1983)**

Technical Assistant – Oil & Gas reserve analysis

## PRESENTATIONS, PROGRAMS & CONFERENCES

**Guest Lecturer**

**University of New Orleans International Summer School, Innsbruck, Austria**

Anatomy of a StartUp (2017)

Boarder Check: Tools for Checking Your Business Model before You Cross the Border (2017)

Corporate Sustainability (2010)

**Program Development LaunchPad2X Accelerator: Rocket Fuel for Women Entrepreneurs (2012- 2017)**

**Advisory Panel & Presenter**

Networking: Be the Magnetic Entrepreneur!

Critical Alignment I: Sources of Capital & Your Business Model,

Critical Alignment II: Talent Acquisition & Your Business Model

Critical Alignment III: Networks that Beat the Odds

Assessing Investability & What Investors Say When You Leave the Room

Moderator: Founder/CEO Panel

**Presenter**

**USC School of Music The SAVVY Arts Venture Challenge (2015, 2016, 2017)**

A Directors Guide to Pitching Investors

**Presenter**

**Global Entrepreneurship Summer School (2016)**

Team Building for Innovation & the Competing Values Model

<b>Presenter</b>	<b>UnternehmerTUM MedTech Bootcamp</b> (2014) Monetization of Business Models
<b>Guest Lecturer</b>	<b>Technische Universitaet Muenchen, School of Management EMBA Program</b> (2014) Customer Development and Acquisition
<b>Presenter</b>	<b>St. Peter Chanel Guest Speaker Series: Faith at Work</b> (2014) Entering Through the Narrow Gate: Understanding the Entrepreneurial Process and Successful Emerging Ventures from a Catholic Perspective OR Why Catholics are Wired for Entrepreneurship
<b>Workshop Leader &amp; Presenter</b>	<b>CareSouth Annual Executive Meeting</b> (2013) Leadership workshop (1/2 day) for senior business development and executive team Leadership & Loops: Lessons from the Military, Entrepreneurs & Cowboys to Ignite Growth
<b>Guest Lecturer</b>	<b>University of South Carolina – Aiken, Department of Management</b> (2013) Entrepreneurship, Leadership & New Venture Creation for BADM 371
<b>Workshop Leader &amp; Presenter</b>	<b>Republican Leadership for Georgia</b> (2012, 2013) Hope is Not a Strategy for Change...Leadership is: Lessons from our Military and Entrepreneurs (1/2 day seminar) Restoring Values-Based Leadership (1/2 day seminar)
<b>Presenter</b>	<b>Babson College Entrepreneurship Research Conference</b> (2013) Presented in Refereed Paper Session Networking and Path Building Processes in Emerging Ventures (Co-authors: Mark Keil and Benjamin Oviatt)
<b>Participant</b>	<b>Georgia State University Center for Ethics and Corporate Responsibility – USMC</b> (2012) Values-Based Leadership Program – Quantico, VA Transformational Leadership Program – Parris Island, SC
<b>Interviewee</b>	<b>Womenetics.com</b> (May 15, 2012) Research featured in entrepreneurship article Are Women Less Risky in Business? (Jan Turner)
<b>Presenter</b>	<b>International Conference on Engaged Management Scholarship</b> (2011) Addressing the Sustainability Challenge: Insights from Institutional Theory and Organizational Learning (co-authors: Mark Keil, Jeanette Miller, James O'Connor)
<b>Presenter</b>	<b>Atlanta Women Magazine Event “Courage to be Rich”</b> (2004) Wealth Management and Investment Basics
<b>Trainer</b>	<b>MBank Dallas</b> (1988- 1989) Development and presentation of coursework and case studies on financial statement analysis, company/industry analysis, loan structuring and problem loan strategies for Commercial Bank Training Program

## PUBLICATIONS

**Journal of Leadership, Accounting and Ethics (2013)**  
“Addressing the Sustainability Challenge: Insights from Institutional Theory and Organizational Learning”  
(Co-authors: Mark Keil, Jeanette Miller and James O'Connor)

## PROFESSIONAL LICENSES & HONORS

**Best Practitioner Paper at the 2011 International Conference on Engaged Management Scholarship** for  
“Addressing the Sustainability Challenge: Insights from Institutional Theory and Organizational Learning”  
(Co-authors: Mark Keil, Jeanette Miller and James O'Connor)

**Beta Gamma Sigma****SERVICE ACTIVITIES**  
(University and Entrepreneurship)

<b>Advisor/Faculty*</b>	<b>USC College of Engineering and Computing Masters of Innovation</b> – SC (2016-Present)
<b>Advisory Board*</b>	<b>LaunchPad2X Accelerator Program for Women</b> – Atlanta, GA (2012-Present)
<b>Advisory Board</b>	<b>SCBIO Quickstart Program for Life Sciences Companies</b> - SC (2015-2016)
<b>Advisory Board</b>	<b>Alumnify, Inc.</b> - San Francisco, CA (2014 – 2016)
<b>Board*</b>	<b>Ethacy, LLC</b> – Jackson, WY (2013- Present)
<b>Board*</b>	<b>Venture Carolina Foundation</b> - Columbia, SC (2017 – Present)
<b>Committee Chair</b>	<b>USC Management Department Executive DBA Exploratory Committee</b> – SC (2016)
<b>Committee Member</b>	<b>USC Management Department Entrepreneurship Curriculum</b> – SC (2015-2016)
<b>Founding Organizer*</b>	<b>Soda City Startup!</b> – Columbia, SC (2017 – Present)
<b>Co-Founder</b>	<b>2X Angel Investor Network</b> – Atlanta, GA (2013 – 2014)
<b>Judge*</b>	<b>USC School of Music The SAVVY Arts Venture Challenge</b> – Columbia, SC (2014 - 2017)
<b>Judge</b>	<b>Clemson Roadshow Competition</b> – Columbia, SC (2017)
<b>Judge</b>	<b>SC Columbia Startup Weekend</b> – Columbia, SC (2016)
<b>Judge</b>	<b>SCBIO Live! Conference Pitch Competition</b> – Greenville, SC (2016)
<b>Judge</b>	<b>Proving Ground Business Plan Competition</b> – Columbia, SC (2013, 2014)
<b>Judge</b>	<b>I2S Georgia Tech Business Plan Competition</b> – Atlanta, GA (2013)
<b>Member*</b>	<b>Atlanta Technology Angels</b> – Atlanta, GA (2013 – Present)
<b>Member*</b>	<b>VentureSouth / Capital City Angels</b> - Columbia, SC (2017 – Present)
<b>Member</b>	<b>Angel Capital Group</b> – Charleston, SC (2013 – 2014)
<b>Mentor/Coach</b>	<b>TIE<sup>2</sup> International Innovation Entrepreneurship Exchange</b> - Munich Germany (2017)
<b>Mentor/Coach</b>	<b>UnternehmerTUM MedTech Bootcamp</b> – Munich, Germany (2014, 2015, 2016)
<b>Mentor/Coach</b>	<b>Global Entrepreneurship Summer School</b> – Munich, Germany (2015, 2016)
<b>Mentor/Coach</b>	<b>SC Columbia Startup Weekend</b> – Columbia, SC (2014, 2015)
<b>Mentor/Coach</b>	<b>TMinus6/firedUP Startup Accelerator</b> - Columbia, SC (2013 – 2015)
<b>Panelist</b>	<b>Venture Carolina Investor Panel: Taking the Non Out of Nonprofit</b> – Columbia, SC (2017)
<b>Panelist</b>	<b>DIG South Angel Investor Panel</b> – Charleston, SC (2014)
<b>Panelist</b>	<b>CETI START! Series #15 Women Building the Future</b> - Columbia, SC (2014)
<b>(Other &amp; Non-Profit)</b>	
<b>Advisor</b>	<b>Grameen Foundation</b> – Washington, DC (2008)
<b>Advisor</b>	<b>Women Thrive Worldwide</b> – Washington, D.C. (2007-2008)
<b>Advisor</b>	<b>Grassroots Capital Partners – Global Microfinance Equity Fund</b> – NY (2007-2008)
<b>Board</b>	<b>MPower Now</b> – Atlanta, GA (2008-2009)
<b>Board of Governors</b>	<b>Buckhead Club</b> – Atlanta, GA (2009 – 2014)
<b>Board of Trustees</b>	<b>Leukemia and Lymphoma Society</b> - Atlanta, GA (1998-2000)
<b>Developer Community</b>	<b>Gray Matters Capital</b> – Atlanta, GA (2007-2008)
<b>Finance Committee*</b>	<b>St. Thomas More Catholic Church</b> (USC Campus Parish) (2016-Present)
<b>Panelist</b>	<b>Board of Directors Network “Politics: Should Business Women Care?”</b> – Atlanta (2009)
<b>Steering Committee</b>	<b>Women Advancing Microfinance</b> – Atlanta, GA (2008-2009)

\* Current/ongoing activities