

# Carlos Vargas MBA, MLA

[carlosvargas@g.harvard.edu](mailto:carlosvargas@g.harvard.edu)

+52 1 55 84243424

Nationality: Mexican and US Citizen

Highly organized, energetic, results oriented and highly accomplished CFO and academic with over 15 years of professional experience in finance and leadership roles for multinational companies with a proven record of accomplishment to work in multinational environments. **English**, Fluent. **Spanish**, Fluent. **German**, B2 Level. **French**, A2 Level. **Portuguese**, Basic.

## Education

<b>University of Zurich</b> – Ph.D. Banking and Finance	2019
<b>Harvard University</b> – Master of Liberal Arts in Sustainability	2013
<b>IPADE Business School</b> – Master of Business Administration (MBA-MEDE)	2006
<b>ITESM</b> – Bachelor of Arts in Finance	2003

## Professional Experience

**Finance Profesor** 04/2019 - Current

***EGADE Business School (Tecnológico de Monterrey, Mexico)***

*EGADE is a leading Business School in Mexico. EGADE is part of ITESM or Tecnológico de Monterrey (in English: Monterrey Institute of Technology and Higher Education) with 26 campuses throughout Mexico and several others in Latin America. ITESM was the first university to be connected to the Internet in Latin America and the Spanish-speaking world, having the top-ranked business school in the region according to the Economist.*

- Lectures include Sustainable Finance, Fundamentals of Finance, and Capstone Project Seminar in Energy.

**Research Associate in Sustainable Finance** 2016 - 2019

***Institute of Banking and Finance at the University of Zurich***

*The IBF is among the leading Banking & Finance Departments in Europe. IBF aims at research of excellence in banking and finance that is relevant to industry, policy, and society as a whole.*

- Develop research in the field of Real Option Assessment in the field of Sustainable Finance.
- Assistant Lecturer for “Mathematical Finance and Derivatives”
- Member of the Swiss Latin-American Center (Swiss Universities).
- Oikos International PhD fellowship recipient 2017.
- AIT Brazil Academy participant in 2018. SWISSNEX

**Chief Financial Officer (CFO)** 2014 - 2016

***New Evolution Ventures, Mexico***

*NEV is an Investment Fund that owns and operates over 1,000 UFC Gym, Alex Rodriguez Energy Fitness, Hard Candy Fitness worldwide.*

- Developed the annual and multiannual forecast, budgeted for debt service.
- Developed and led a high execution business with strict growth objectives.
- Approved capital projects and obtained appropriate sources of funding.
- Managed the short and long-term financial performance by developing accurate forecasts.
- Ensured that the company is in continuous compliance with all statutory, regulatory, etc.

**Chief Operating Officer (COO)** 2012 - 2013  
***The Vertex Companies, U.S.A.***

*Managed the acquisition and integration of a specialized services firm to consolidate the company's Energy Services portfolio and to gain increased revenue of over \$1,000,000 in the first year.*

- Streamlined financial models for Renewable Energy projects in the USA and Mexico.
- Developed and updated the Capital Budgeting and Planning for the energy efficiency division
- Prepared and reported monthly and quarterly financial results.
- Prepared tailored reports for the board as needed.
- Supported other divisions of the company in special projects and other activities as required.

**Senior Investments Associate** 2007 - 2011  
***BBVA Asset Management, Mexico***

*Managed the investment portfolio of the RE fund and led ventures investing for the development of over 10,000 homes in Mexico (\$200,000,000 USD in value).*

- Prepared the annual and multiannual programming of capital expenditures.
- Conducted roadshows and promotional activities for funding and capital sourcing.
- Performed due diligence for new investment opportunities.
- Negotiated lines of credit with financial institutions to source expenses and investments.
- Prepared tailored reports according to IFRS and local standards.

**Investments Manager** 2006 - 2007  
***Liverpool Inc., Mexico***

*Shaped and implemented strategic plans representing savings of over \$5,000,000 USD in 2007.*

- Represented the company in negotiations of acquisitions and joint ventures.
- Negotiated new land acquisitions and business deals with an estimated value of \$100 million.
- Evaluated potential new development sites, prepared the due diligence for the acquisitions.
- Steered the review of annually, quarterly and monthly results.

**Senior Financial Analyst for General Ledger** 2003 - 2004  
***Hewlett Packard, Mexico***

*Prepared and presented financial reporting for two division of HP in the U.S. and Puerto Rico.*

- Primed diverse documentation and proposals for the management team.
- Supported the implementation of SAP in the FI and CO modules.
- Reported monthly, quarterly and yearly results in an accurate and timely fashion.

### **Other Experience**

**Harvard University** – Lecturer for “Sustainable Finance and Investments” 2013 – Current

**University of Massachusetts** – Lecturer “International Development Institutions” 2016

**Tec de Monterrey (Mexico)** – Lecturer “Evaluación de Proyectos y Financiamiento” 2015 – 2016

**ISSSTE, Mexico (Federal Public Health Agency)** – Senior Advisor of the CFO 2013 - 2014

**ITAM & UIA (Mexico)** – Guest Lecturer 2007 – 2011

**CNN Expansion, Dinero en Imagen, El Economista & El Financiero** (*Available upon request*)