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## JANETTE BROOKS



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(707)890-0455

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## EDUCATION

**Certified Public Accountant**  
**Certified Exit Planning Advisor**  
**Selected for Colorado Board Bound Program**

**B.S. in Business Administration and Finance, Minor in International Business**  
**University of San Diego 2003**

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## PROFILE

Bilingual, approachable financial expert, and Independent Director for private companies, banks, ESOP, Agtech, fintech, multi-generational and closely held companies. Janette's career has allowed her to embrace cultures of disruption and become an agile leader that can execute succession planning events via merger, interest sales/transfers, liquidation, new leadership transition, and debt restructuring/debt solutions. She can quickly assess business transition option, risks and select the highest value course of action. She is an expert at removing silos, spurring culture evolution through value building projects that unlock enterprise value and improve investment worthiness of companies. As CFO she has directly reported to a private equity board and provided quarterly performance results, audit results and pre-M&A preparation. She enjoys spurring ESG conversations & triggering focus on the inclusive economy.

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## CORPORATE LEADERSHIP

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**D4 Fiduciary, Business Advisory, and Family Office Services, Inc.**  
Founder and President 2022 to Present

After identifying an opportunity in the regulatory banking environment directly impacting the wealth transfer industry, She built a boutique wealth transfer firm providing three major services: Professional Fiduciary Services, cross generation business transition services, professional board service and board formation service. The demand for wealth transfer services has allowed her practice to exceed growth expectations.

**Wells Fargo Private Bank, Inc.**  
Vice President 2016 to 2022

She managed a portfolio of 63 closely held entities, with an average portfolio market value of \$1B. Transitioned controlling positions for C & S Corporations, passthrough entities, holding companies in diverse industries including real estate, oil and gas, land development and multifamily real estate. Served as board member, director, or manager during business transitions. Executed transactions including 1031 exchanges, loan refinancing, and loan restructuring events. Ensured operating companies had key executives running the day to day needs of the organizations.

**Maverick enterprises, Inc.**  
CFO 2014 to 2016

Maverick was a private equity owned, vertically integrated secondary closure manufacturing company that purchased raw materials in Italy. As CFO she led the organization in projects that disrupted family culture practices triggering improved margins. And unlocking EBITA potential. Removed technology risk by upgrading operational systems that had security and data corruption vulnerabilities.

**Lixit Corporation**  
CFO/CONTROLLER 2012 to 2014

Lixit was an employee-owned manufacturing company that makes component parts in China & Taiwan, and assembles products in the U.S. Core products are focused on small animal watering and feeding devices sold to WalMart, Target and other large retailers. Led financing/liquidity projects enabling future business growth. Merged two product lines into the business and improved product diversification.

