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## **EXPERIENCE**

### **Alice New York, NY 2019 – Present** **SVP**

- Launched the initial Revenue team from scratch to \$1.6M in ARR in 12 months
- Developed strategic partnerships with the 4 of the largest HCM/Payroll solutions
- Responsible for Marketing, Business Development, Direct Sales and Channel Sales for an A stage Bain backed start up (10 FTE)

### **Upserve Providence, RI/New York, NY 2017 – 2019** **SVP/EVP**

- Led entire Revenue team in 2018, creating the 6 highest months of Bookings in Company history after taking over the entire Revenue team resulting in a pace of \$15M in new ARR
- Rejuvenated 200+ Partner distribution channel, creating a new strategy, org structure and sales process to increase revenue by 40% and decrease cost by 50% in 2018
- Responsible for Sales Development, Sales Enablement, Direct Sales, Channel Sales and Revenue Operations

### **Signpost New York, NY 2015 – 2017** **SVP**

- Developed Agency distribution channel, creating a new strategy, team and process to result in over 150 marketing agency partnerships and \$1M current revenue run rate from inception.
- Restructured and grew the Franchise and Association distribution channel, resulting in 50% increase in channel revenue during 2016.
- Named in Inc 500 (#330) for Fastest Growing Companies in 2016 during tenure.
- Responsible for Channel Sales, Channel Account Management, Business Development and Human Resources (50 FTE).

### **LendKey New York, NY 2013 – 2015** **Chief Strategy Officer/Chief Revenue Officer**

- Initiated an Institutional client division, resulting in \$1B capital commitment in lending
- Restructured sales team and process to achieve 100%+ growth in sales pipelines with 2015 sales surpassing 2014 levels within 6 months and over 100 active prospects.
- Responsible for Sales, Account Management, Business Development, Marketing, Operations and Human Resources (60 FTE).

### **OnDeck New York, NY 2009 – 2013** **Chairman (2012 - 2013)**

- Led Board Credit Committee with innovative new data and credit solutions.
- Surpassed \$40 million in cash revenues for 2012 with 4Q revenue run rate of \$60 million.

### **Chief Operating Officer/President (2009 - 2012)**

- Grew revenues 5X under leadership in 2011 from 2009 from \$4 to \$26 million and named in 2012 to Inc 500 Fastest Growing Companies. Revenue run rate at \$40 million annualized when left role. 117% increase in overall unit volume with new customer growth of 176%.
- Loan originations increased to \$176 million annually in 2012.
- Completed \$19 million equity capital raise and over \$200M in debt facilities in 2010/12.
- Launched Platform Solution Group in 2011 to expand technology distribution to banks, digital players and corporations interested in facilitating trade finance in small business.
- Developed infrastructure in credit, operations, marketing, human resources, legal, finance and accounting while managing these functions for Company.
- Promoted to President and named to Board within 8 months of hire.
- Managed 100 FTE (Sales, Marketing and all operational aspects of Company), creating a new direct inside sales initiatives to complement existing partner distribution strategy.

### **Irwin Financial Corporation Columbus/Indianapolis, IN President – Commercial Banking (2003 - 2009)**

- Grew Division organically from \$270 million in assets to \$3.2 billion in assets (as of 12/31/07) in ten states over the past 20 years with asset growth being 13% during tenure as President.
- Compounded annual net income growth of 24% from 1996 through 2007 with similar growth in loans and deposits for the institution during that time span.
- Created leadership development program for top 75 senior executives of Company that resulted in internal promotions increasing from 46% to 64% in three years. Program also created over \$5 million in cost savings/new revenues for the Bank.
- Led/fostered work environment that was recognized as a top twenty Best Places to Work in Indiana in 2006 and 2007 by the Indiana State Chamber of Commerce.
- Grew assets from wealth management activities to over \$1 billion in assets under management
- Managed an organization of 650 FTE that targeted clients who are privately owned businesses with revenues less than \$50 million and high net worth individuals. Product lines include commercial, mortgage and consumer lending, deposit/treasury services and wealth management.

#### **Prior roles at Irwin Financial and Deloitte included:**

- **EVP/Chief Operating Officer, SVP and VP – Commercial Banking**
- **Vice President – White River Capital (VC sub of IFC)/ Planning Officer – IFC**
- **Senior Business Consultant & Staff Consultant – Deloitte**

### **EDUCATION**

**Kellogg School of Management, Northwestern University, MBA, Marketing/Finance**  
Obtained degree through accelerated four quarter program for 60 participants  
**University of Notre Dame, BBA, Accounting, *magna cum laude***