



Roberta Sydney
Independent Board Director and Former CEO

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- Over 30 years of outstanding shareholder performance and profitability in real estate and financial services through 5 challenging market periods -- successfully financed over \$1B of real estate transactions in all cycles
- Qualified financial executive who has been a CEO, founder-entrepreneur & senior corporate executive
- Entrepreneurial, focused, collaborative leader recognized for longstanding business relationships and client retention
- Named as Private Company Director to Watch 2020
- According to colleagues, “Brings light rather than heat” to issues-- systematically raises teams to higher levels of excellence and builds consensus

Education

BA, Wellesley College

MBA, Harvard

MS, MIT

NACD

. Certificate in Cyber Security

. Governance Fellow

American College of Corporate Directors

. Silver Executive Masters Professional Certificate

Sector/Skill Sets

Real Estate / Construction

Prop-Tech

Mortgages / Banking

Investment Management

Health Care

Financing

Venture Financing

M & A / Divestiture

Business Models

Public

Privately Held

Family Owned

Venture Backed

Start-Up

SaaS

B2B / B2C

Invited to

C200

International Women’s Forum

Women Corporate Directors

The breadth and depth of Roberta’s experience comes from serving in executive and board leadership positions with regulated real estate and financial services firms ranging from large, traditional organizations to young, entrepreneurial companies.

As an entrepreneur, she founded a real estate firm in 1999, developed and managed 9 million square feet before a successful exit and earn out. During her tenure, she cemented deep relationships with prestigious clients/tenants such as Bank of America, Trader Joe’s, Beth Israel Deaconess Medical Center, AT&T, and CVS.

Roberta serves on the Board of Tiedemann Advisors, a wealth advisor with \$26 Billion in assets across the USA and Europe. She also Chairs the Nominating and Governance Committee and serves on the Board of Kiavi (formerly LendingHome), the leading lender for real estate investors. Previously, she Chaired the Compensation Committee for Plaxall, Inc., the Long Island City based manufacturing and real estate company that secured Amazon for their HQ2 before Amazon withdrew.

Roberta possesses a combination of leadership skills in real estate development, financial transactions, negotiations, digital transformation, marketing, and IT system evaluation. She also brings digital and industry expertise to VC-backed real estate technology startups including Locatee. These startups create SaaS and device solutions to lower expenses, drive energy efficiency, improve tenant retention using predictive data analytics leveraging machine learning and IoT devices.

Roberta is a sought-after speaker on Real Estate and Governance topics at universities and organizations such as Harvard Business School, Dartmouth’s Tuck School of Business, Bentley College, The MIT Center for Real Estate, Women Corporate Directors, and the Private Company Governance Summit. She is also fluent in French.

In addition to her many accomplishments, Roberta is actively engaged in philanthropy serving on the Trustee Advisory Board of the Beth Israel Deaconess Medical Center, a Harvard teaching hospital. Roberta has also mentored dozens of entrepreneurs through StartUp Partners, a local coaching initiative she co-founded through Harvard Business School Alumni.

Roberta and her spouse Jordan reside in Boston and have three adult children.

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CAREER CHRONOLOGY**BOARD SERVICE**

- Kiavi (formerly LendingHome, Inc.)** San Francisco, CA **2021-present**
Independent Director and Nominating/Governance Committee Chair for real estate technology lender for investors.
- Tiedemann Advisors, Inc.** New York, NY **2019-present**
Independent Director for global wealth advisor.
- Plaxall, Inc.** New York, NY **2017-2021**
Independent Director and Compensation Committee Chair for manufacturing and real estate business.

EXECUTIVE ROLES

Sydney Associates, Inc., Boston, MA

Midsize private Commercial Real Estate Development Company with successful exit and earnout in 2019.

Chair **2016-2019**

Founder and Chief Executive Officer **1999-2015**

- Set vision and strategy for the acquisition, development, financing, and selective divestment of over 9 Million square feet of residential, retail and office property, averaging annual shareholder returns of more than 15%.
- Supervised regulatory compliance, investor relations, and tenant servicing for operations, brokerage, and leasing.
- Worked comfortably across disciplines to navigate win-win land purchases, permitting approvals, financing terms and construction contracts.
- Developed relationships and negotiated multi-year real estate leases with prestigious clients such as Bank of America, Trader Joe's, Beth Israel Deaconess Medical Center, AT&T, and CVS.

Sydney Construction, Inc. Boston, MA **1997-1999**

President

- While simultaneously working at State Street Global Advisors, took over and led a family construction company, subsequently transitioning to real estate development and founding her own enterprise.

State Street Global Advisors, Boston, MA **1997-1999**

SSgA is world's 3rd largest asset manager.

Principal

- Pioneered and launched a new division to market the firm's institutional grade services to the Registered Investment Advisor market for their high-net-worth clients. Garnered \$175MM in new assets within first year.
- Negotiated selling agreements and contracts with major wire house firms, such as Smith Barney and Schwab.

BayBank, Boston, MA **1993-1996**

BayBank was a leading consumer bank in the nation acquired for \$2.1 Billion by Bank of Boston in 1996.

Senior Vice President, Consumer Lending and Mortgages

- Managed \$4.6 Billion in assets, garnered annual mortgage originations of \$850 Million.
- Achieved #1 rank for the first time in BayBank's history while staying #1 in other consumer lending products.
- Architected a 20% reduction in operating expenses, accompanied by a 50% improvement in profitability.

Business Consultant, Los Angeles, CA **1990-1992**

- Delivered strategic analysis, planning, and marketing feasibility studies for senior housing and high-tech firms.

Leisure Technology, Los Angeles, CA **1988-1990**

Director, Forward Planning for nationwide active adult retirement community developer with seven subsidiaries.

- Delivered deep strategic and operational real estate planning and feasibility recommendations supporting "go/no go" decisions. Generated business and marketing plans and successfully negotiated loans totaling \$711 Million.

The Boston Company, Boston, MA **1979-1987**

The Boston Company (now BNY Mellon) delivers investment capabilities to the institutional and retail communities.

Vice-President, Direct Financial Services Developed and pitched business plan to Board. Launched and built Direct Selling Division for the firm including call center, CRM, cross-selling and direct mailing activities.