
Julie A. Fellows

[LinkedIn](#), [Denver metro area](#)

My Board Value

- Executive Leadership – Skilled in leading transformational change initiatives
- Strategic Growth - Accomplished in balancing enterprise growth while mitigating risk in complex, global environments
- Financial Expert - SEC qualified “financial expert” for Audit or Finance Committees
- Regulatory Liaison - Successful history working and negotiating with government and banking regulators

Career Summary

A qualified “financial expert” under Sarbanes-Oxley and SEC requirements for Audit or Finance Committees. Skilled at optimizing returns while mitigating risk. Strong understanding of corporate governance and regulatory compliance in the global financial services industry. Demonstrated ability to build trust with regulatory agencies and banking regulators on strategic and crisis issues.

20+ years of experience as a trusted advisor to boards of public and private companies, CEOs, and executive teams. Deep M&A due diligence and acquisition integration experience. Global experience in countries across Europe, Asia Pacific, Australia, India and Canada. Experience ranging from start-ups to global entities with assets over \$30B.

Strategic Expertise

- | | | |
|--|--|--|
| • Risk assessment and due diligence | • Strategic advisor to boards and C-suites | • Private equity firm partnerships |
| • M&A due diligence | • Regulatory liaison | • Acquisition integration |
| • Global expansion initiatives | • Specialty finance and equipment leasing | • Industry expertise in transportation, energy, healthcare, and technology |
| • ERM, Credit and Regulatory Compliance Programs | • Securitization | • Asset expertise in air, rail, renewable energy, and imaging |
| • Portfolio modeling and stress testing | • Vendor financing partnerships | |
| • Assessing new technology risks: cyber-security, AI, blockchain | • Transaction structuring | |

Key Career Accomplishments

- Retained by private equity owners to collaborate with the company’s board, executive team, and investment bankers to sell the organization to a strategic buyer.
- Recognized with KeyCorp’s “Award for Excellence” in developing and implementing a global enterprise risk management program.

-
- Proven ability to solve complex regulatory challenges, closing investigations and significant proposed enforcement actions **with no monetary implications**.
 - Speaker at financial industry conferences on risk management and regulatory compliance.

Career Highlights

CEO and Founder at J.A. Fellows and Associates, 2014 – Present. Consultancy providing credit and risk management services, compliance, and leadership programs to boards and executive teams.

Senior Vice President, Chief Compliance Officer, SquareTwo Financial Corporation, \$480M assets. 2014 – 2017
Led transformational regulatory compliance change initiative for the board and C-suite. Developed a robust compliance risk program and repaired broken relations with regulatory agencies.

Senior Vice President, Portfolio Management, Key Equipment Finance, Inc. & Senior Vice President, Portfolio Management and Chief Compliance Officer, Key National Finance, (KEY) \$138B assets. 1999 –2013
With increasing roles of complexity, developed and led successful, broad portfolio management programs. Interaction with full board, board committees, and C-suite executives.

Previously held positions in the capital markets group at **Republic Financial Corporation** and the **United States Treasury Department Office of the Comptroller of the Currency** as a **National Bank Examiner**.

Board Positions and Organization Involvements

Global Food Exchange, Inc., Board of Advisors; Member

University of Colorado Alumni Association, Board of Directors; Treasurer, CU-Boulder Alumni Association;
Member, Executive Committee; Chair of Budget and Finance Committee

University of Colorado Foundation, Board Trustee

The Leasing Exchange, Board of Directors, Board Member;

Equipment Leasing and Finance Association, Committee Member

Equipment Leasing and Finance Foundation, Research Committee, various committee positions;

The Leadership Investment Foundation, Wise Women Counsel - Member

The Mile High United Way, Women United - Member

Education and Training

Graduate, Leadership Ascent, Executive Leadership Development,

Bachelor of Science, Business Administration, International Business

The University of Colorado at Boulder, Leeds School of Business

International Finance and Politics Seminar,

The University of Colorado at Boulder, and the London School of Business and Finance

Graduate, JumpStart Program, Women2Boards

Graduate, Board Accelerator Program, Advisory Board Architects

Current Participant, Corporate Board Bound Program, Women's Leadership Foundation

Professional Certifications

Commissioned National Bank Examiner, Office of the Comptroller of the Currency

EQi 2.0, EQi 360 and Team Emotional & Social Intelligence (TESI) Facilitator

Total Quality Management (TQM) Team Facilitator and Black Belt Project sponsor