

# DAVID A. WAREIKIS

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Carrollton, TX 75007

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**SUMMARY** Mr. Wareikis has over 15 years of experience building, running and advising telecom companies and is an advocate for low-income consumer wireless and broadband needs. David began his career with Banc of America Securities, media and telecom investment banking group. Over the years, David has developed a strong expertise in helping low-income consumers get connected through the USAC Lifeline program. Mr. Wareikis is founder and CEO of Blue Jay Wireless and has served as adviser to such prominent companies as Belo Corp., Cablevision, Charter Communications, Comcast, Conterra Ultra Broadband, Rainbow Media Group, Radio One and Time Warner Entertainment, among others. Mr. Wareikis is a member of the Board of Directors at The Samaritan Inn, a non-profit organization based in McKinney, Texas which is the largest homeless shelter program in Collin County. Mr. Wareikis earned a Bachelor of Arts in Economics degree from the University of Pennsylvania.

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**EXPERIENCE BLUE JAY WIRELESS, LLC** Carrollton, TX  
04/12 - current *Founder, Chief Executive Officer and President*

- Blue Jay Wireless offers subsidized wireless service for over 150,000 low-income subscribers nationally through the Lifeline low-income assistance program.

**EXPERIENCE ASSIST WIRELESS, LLC** Fort Worth, TX  
10/10 - 04/12 *Co-Founder, Chief Financial Officer and Consultant*

- Implemented numerous improvements in company software, billing, and order entry systems including facilitating inventory tracking functionality.
- Managed daily budgeting for company and performed financial forecasts.
- Facilitated provisioning with carriers and activation of over 100,000 lines on Sprint and Verizon networks.
- Assisted in the preparation, review and negotiation of agreements with key vendors.
- Directed numerous enhancements and customization of BeQuick Software systems.
- Assisted in the development, training and mentoring of the company's Chief Operating Officer, Cost Accountant and other staff and employees.
- Drafted executive summary memorandums and management presentations.

**EXPERIENCE TIMELESS CAPITAL, LLC** Dallas, TX  
05/08 - 09/10 *Managing Director and Consultant*

- Served as senior advisor to telecommunications companies including wireline telecommunications businesses serving the Lifeline industry.
- Performed C-level financial and operational support for telecommunications business.
- Analyzed potential telecommunications acquisition opportunities.

**BLUFFVIEW SECURITIES, LP & BLUFFVIEW CAPITAL, LP** Dallas, TX  
03/08 - 01/10 *Managing Director, Corporate and Investment Banking, Media and Telecommunications*  
01/05 - 02/08 *Vice President, Corporate and Investment Banking, Media and Telecommunications*  
07/03 - 12/04 *Senior Associate, Corporate and Investment Banking, Media and Telecommunications*

- Originated and executed several private debt and equity capital raises and mergers and acquisition transactions in the telecommunications industry.
- Created customized client and investor management database for firm.
- Worked closely with a wide variety of investor groups including private equity funds, hedge funds, family offices and various high net worth and accredited investors.

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## **BARRIER ADVISORS, INC**

Dallas, TX

02/03 - 06/03 *Consultant, Restructuring and C-Level Operational Advisory Group*

- Performed analysis for key stakeholders to evaluate and implement options for troubled, distressed and under-performing companies.
- Analyzed liquidity and financing performance relative to 13-week cash flow forecasts.
- Evaluated the feasibility of distressed company business plans and prepared operating recommendations.

## **BANC OF AMERICA SECURITIES LLC**

Dallas, TX & New York City, NY

07/01 - 09/02 *Associate, Corporate and Investment Banking, Media and Telecommunications*

- Developed and maintained advanced financial models for pro forma analysis; merger consequences analysis; LBO analysis; accretion/dilution analysis; and comparable company, precedent transaction and valuation analysis.
- Prepared offering memorandums, organizational meeting and due diligence materials, roadshow and sales force presentations, and internal committee approval memos.
- Served as lead associate on execution of several media and telecommunications book managed capital markets transactions.
- Completed a six-month rotation through New York City office.
- Participated in a four-week training program in New York City.

07/98 - 06/01 *Analyst, Corporate and Investment Banking, Media and Telecommunications*

- Supported deal team origination and execution of capital markets and M&A transactions.
  - Drafted offering memorandums, internal committee approval memos, due diligence materials, client overviews and descriptive memoranda.
  - Conducted extensive research covering media and telecommunications industry trends.
  - Developed and maintained comparable company and precedent transaction models.
  - Performed extensive financial modeling and capital structure analysis.
  - Participated in a six-week training program.
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## **EDUCATION UNIVERSITY OF PENNSYLVANIA**

Philadelphia, PA

Bachelor of Arts in Economics, 05/98

Crew Team, Heavyweight Rowing

## **OTHER**

Member of **Lifeline Connects Coalition** created to improve policy for low-income consumers needs to connect to friends, family and employers

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# Daniel Stark, CPA

dstark@bluejaywireless.com

**Attributes** Ten years of executive financial leadership, healthcare transaction advisory, and public accounting experience  
Created finance, accounting and human resources departments, developing processes and specific business solutions  
Strong cognitive reasoning, analytical and research abilities; passionate about developing and implementing ideas

## Work

### Experience

**Chief Financial Officer, Blue Jay Wireless LLC** 2014 – present, Carrollton, TX

- Grew company from 30 to 400 employees in less than 12 months
- Hired as VP of Finance; promoted to VP of Finance and Accounting within four months; promoted to interim CFO within seven months; promoted to CFO within ten months
- Developed initiatives reducing expenses (both SG&A and COS) by over 25% with no loss in productivity
- Created and implemented strategy to convert from cash-basis to US GAAP accrual basis within first four weeks
- Hired and managed financial department of 15 employees, including creating an HR department, bringing payroll in-house, and creating inventory management process
- Increased monthly revenue from approximately \$1.5 million to nearly \$3.0 million

**Manager, Financial Due Diligence – Healthcare advisory practice, KPMG LLP** 2006 – 2014, Dallas, TX

- Consistently rated at highest level among peers, only awarded to top 10-20% of class
- Recognized by all supervising directors and partners as significantly above average for project delivery, communication and management skills including client relationship building
- Active in firm “extracurriculars” including serving on national rotation to assist in development of audit training materials, and core recruiting teams for Texas A&M
- **Advisory practice, 2010 – 2014**
  - Concentration on healthcare financial due diligence (FDD), including developing valuation models, pro forma cash flow estimates and integration efforts
  - Focus on both small transactions and multi-billion dollar transactions, including:
    - Strategic investors: Tenet Healthcare Corporation; LHP Hospital Group, Inc.; Baylor Health Care System; LifePoint Hospitals; ProPT.
    - Private equity investors: Apax Partners LLP; Great Point Partners LLP; Riverside Company; Irving Place Capital; Freeman Spogli and Co.; Diamond Castle; Bain and Company; HIG Capital
  - Responsible for performing detailed financial and accounting analysis of potential private equity and strategic investments, including hospitals, hospices, home health, dental, workers compensation, physical therapy, medical eCommerce, teleradiology, and call center management
  - Served as lead integrator between the US healthcare FDD and our team in India, acting as a liaison for employees on rotation to the United States
  - Operated as project manager for multiple projects, ranging from private equity “phase one” to strategic full diligence
- **Audit practice, 2006 – 2010**
  - Clients included: Samsung Telecommunications America, A. H. Belo, AMX, Airborn and Fujitsu Transaction Solutions, Nortel, EDS, Securus, Voyager Expanded Learning and PFS Web
  - Developed unique studies of technical audit areas including revenue recognition, intercompany transactions and software development recognition
  - Selected for rotation in Montvale, NJ “think tank” to train current and future employees

### Education

**Texas A&M University** – Masters of Science in Finance, 4.0 GPA; Bachelors of Business Administration in Accounting, 4.0 GPA. Graduated first in graduating class of 4,220. Summa cum laude and business honors. Designed and founded a fully credentialed class for freshmen.

GMAT: 760 overall, 6.0 AWA (99th percentile)

### Other

#### Activities

**March of Dimes**, *Walk for Babies Volunteer & Member of KPMG Dallas Steering Committee*  
**Knights of Columbus**, *Chapter 799 1<sup>st</sup> degree member*  
**AICPA**, *Member*  
**TSCPA**, *Member*

# Angela Husney

## ❖ PROFILE

Results-oriented Operations expert with over 20 years of call center, contact center management and extensive quality / project management experience in a position which directly supports a company's strategic initiatives while providing career growth. Dedicated and self-motivated with the ability to effectively manage vendors, employees and projects.

## ❖ STRENGTHS

- Perform research, analysis, design and implementation of business systems to meet current and future user requirements.
- Detailed experience in setting up functional business groups including billing integrity, asset management and financial reporting.
- Extensive experience in process definition, process mapping and business requirements development.
- Execution of standard control plans and process ownership to preserve process integrity.
- Manage vendor relationships from initial contract review through implementation and on-going compliance monitoring.
- Employee development and front line coaching with a focus on results.

## ❖ COMPUTER SKILLS

- Microsoft Office
  - Word
  - Excel
  - PowerPoint
  - Visio
  - Outlook
- Internet Applications
- Experience with multiple proprietary billing systems

## ❖ HIGHLIGHTS OF ACCOMPLISHMENTS

- Established multiple strong call center operations from initial staffing, process design, system implementation, training, motivation and continual evaluation and improvement at both strategic and tactical levels.
- Successful integration of BeQuick billing platform with major wireless providers including T-Mobile and Sprint.
- Envisioning future business risks, identifying areas of improvement, formulating business solutions, and developing processes that forge high efficiency and service excellence while establishing a management philosophy that promotes involvement and participation of all organizational levels.
- In-depth exposure to high-tech business strategies, product support and customer service solutions; recognized as a Product Champion, Process Advocate and Change Agent.
- Driving force in the success of multiple startup CLECs.
- Owner/Operator of a UPS Store franchise for 5 years.
- Project Management Certification.

## ❖ PROFESSIONAL EXPERIENCE

Blue Jay Wireless 2013 to Present  
*A leading prepaid wireless company based in Dallas Texas.*

### Vice President of Operations

- Maximize functionality of the OSS system.
- Manage 3<sup>rd</sup> party vendor BeQuick Software.
- Manage all aspects of billing, order management, customer relationship management, and call center automation.
- Maximize growth and profitability while leading and managing all company operations functions.
- Implementation of short- and long-term programs and processes to optimize work flow.
- Collaborate with other company departments and segments of management to establish and execute responsibilities.

## PROFESSIONAL EXPERIENCE (con't)

### BeQuick Software, Inc

2006 to 2013

*Software company providing hosted BSS/OSS platform*

#### **Project Manager**

- System analysis, deployment and training of BeQuick Software and Fusion OSS system
- Facilitate & document business process review sessions with internal and external clients
- Perform process/requirements gap analysis against critical requirements
- Lead functional design teams & user acceptance testing
- Complete application configuration / customization
- Facilitate user feedback / UAT sessions
- Managed implementation of Sprint and T-Mobile integrations
- Integration with multiple third party vendors to include payment gateways, print vendors and carriers

### Liberty Bell Telecommunications, LLC

2003 to 2006

*Startup competitive local phone company (CLEC) providing service in the Colorado Market*

#### **Director of Operations**

- Grew revenue from \$0 to \$4.3 million per year within 3 years
- Initial development of operational structure, staffing and management including sales, IT, customer care, provisioning, billing and maintenance/repair departments
- Strategic development of billing system including implementation and migration of billing system which increased revenue and cost savings
- Managed initial implementation and on-going relationships of various vendors including billing, printing, multiple service providers, banking institutions, accounting and IT

### Arrival Communications

2000 to 2002

*Facility based competitive local phone company (CLEC) providing service in the state of California  
Denver office closed 2002.*

#### **Director of Order Management**

- Developed and implemented order management system for DSL and other telecom products.
- Created Tier 1 and Tier 2 DSL support teams. Developed organizational structure and training documentation and courses.
- Developed support mechanisms for various products including ISP (DNS, Website, dial-up) and Telecom (voice and data).

### Qwest Communications, Inc

1998 to 2000

*A provider of telecommunications products and services nationwide.*

#### **Manager of Provisioning, Consumer Markets**

### MCI Telecommunications, Inc

1994 to 1998

*Nationwide provider of voice and data services.*

#### **Multi-location Manager**

### Continental Airlines

1986 to 1994

*Airline Company*

#### **Flight Attendant**

*References available upon request*

## Lauren Moxley

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E-mail: [lmoxley@bluejaywireless.com](mailto:lmoxley@bluejaywireless.com)

Phone: (202) 319-0954

### SUMMARY:

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Lauren has an extensive background and understanding of FCC compliance rules, regulations and new policy reforms stemming from over four years of telecommunications experience. Prior to joining Blue Jay Wireless, Lauren worked for a nonprofit organization where she drafted and reviewed Lifeline policy recommendations before moving onto the Universal Service Administrative Company (USAC) where she worked directly with Lifeline providers to uphold compliance requirements. Lauren has utilized her unique perspective gained from her varying roles relating to Lifeline to successfully oversee the compliance department at Blue Jay and ensure that Blue Jay's internal operations meet and often exceed Lifeline program state and federal requirements.

### EXPERIENCE:

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#### **Blue Jay Wireless, LLC, Dallas, Texas**

##### ***Vice President, Regulatory and Public Relations (September 2014-Present)***

- Provide compliance oversight, including oversight of internal auditing team
- Create and amend internal policies and procedures to ensure strict compliance with state and federal rules
- Liaise between Blue Jay Wireless and the Federal Communications Commission (FCC), Universal Service Administrative Company (USAC), the Lifeline Reform 2.0 Coalition, and other interested parties
- Provide direction to internal staff regarding state and federal Lifeline rules and requirements
- Oversee initial and annual certifications to ensure compliance standards are met
- Oversee compliance onboarding of all Regional Sales Managers
- Create and review compliance training materials and Lifeline-related forms and documents
- Review all Lifeline marketing materials to ensure state and federal requirements are met

##### ***Regulatory and Public Relations Manager (May 2014-September 2014)***

- Provided Lifeline regulatory and compliance oversight
  - Included conducting a "mock" audit of Blue Jay's internal policies and procedures to identify opportunities to enhance compliance and regulatory transparency
- Liaised between Blue Jay Wireless and the Federal Communications Commission (FCC), Universal Service Administrative Company (USAC), the Lifeline Reform 2.0 Coalition, and other interested parties to strengthen regulatory compliance and provision Lifeline program growth and reform support
- Provided program expertise to staff regarding federal and state program rules
- Ensured enrollment and de-enrollment procedures are in compliance with the National Lifeline Accountability Database (NLAD) standards, as established by the Commission and USAC
- Created and reviewed internal policy and procedures documents
- Monitored Lifeline-related federal and state activity as it applies to Blue Jay operations

#### **Universal Service Administrative Company, Washington D.C.**

##### ***Program Manager, Lifeline (April 2013-May 2014)***

- Liaised between USAC and over 2,000 telecommunications companies and consulting firms for conducting and completing annual recertification requirements and reporting, as required by the FCC
  - Required meeting strict deadlines, conducting training to enhance federal requirement awareness and accuracy, receiving, reviewing, analyzing and reporting on 100 percent of data submitted by telecommunications carriers
- Lead the 2013 and 2014 Recertification Election Process where approximately 150 carriers, representing nearly 400,000 subscribers, had elected USAC to conduct the annual recertification on their behalf
- Supported the Internal Audit Team by providing management responses to audit findings and overseeing the collection of recoveries
  - In 2013, this included 25 audits totaling over \$1.6 million in Lifeline program support.

- Collaborated with USAC's internal IT team to design, generate and test reports and internal/external online systems used by over 2,000 telephone companies, 17 million Lifeline program subscribers, and other stakeholders
- Conducted outreach to maintain program integrity and awareness: created web materials, drafted news items and program notices, and conducted webinar presentations and conference calls with telecommunications providers

***Assistant Program Manager, Lifeline (September 2011-April 2013)***

- Generated quarterly and annual reports for the Federal Communication Commissions
- Created and maintained website content for the Lifeline department at [lifelinesupport.org/li/](http://lifelinesupport.org/li/)
- Responded to Lifeline Program inquiries and complaints from consumers, telecommunication carriers, and various state agencies
- Reviewed 100 percent of all incoming carrier's state and federal designation orders and requests for federal Lifeline program support
- Created outreach materials for consumers and telecommunication carriers

**One Economy Corporation, Washington D.C. (January 2011 – August 2011)**

- Monitored and commented on FCC hearings and notices as well as pertinent policy initiatives and legislation
- Conducted research on diverse areas such as federal telecommunications legislation, education, and state housing policies
- Assisted the Vice President of Policy and Strategy in drafting policy recommendations

**EDUCATION:**

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**University of California, Los Angeles, CA**

B.A. Political Science (Cum Laude), International Relations concentration

**PROFESSIONAL SKILLS:**

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Proficient in Excel, Word, PowerPoint, SharePoint, Access, Outlook, Quickbooks, Datadesk

Danielle Perry  
dperry@bluejaywireless.com

### **Qualifications**

Skilled at developing productive relationships, discovering clients' needs, implementing effective solutions, and working with cross-functional teams to ensure all clients are served appropriately.

Proven ability to lead teams and manage projects to achieve targeted goals by demonstrating creative problem solving skills and applying a hands-on approach.

Experienced in creating and implementing processes and procedures that result in increased corporate revenue as well as extremely satisfied customers.

I am a motivated leader with a work ethic second to none, who excels in challenging environments.

### **Professional Experience**

10/14 – Present Blue Jay Wireless, LLC. – A socially conscious technology distributor

#### **Chief Information Officer**

- Manage and implement technology road map
- Creation of new systems and processes to allow additional growth opportunities
- Enhancement of current systems to make certain the full potential is achieved
- Ensure most current technologies are being leveraged for success

#### **Vice President of Operations**

- Manage Carrier and BSS/OSS relationships
- Provide management support for two off shore call centers
- Create processes and procedures to improve internal operational efficiencies
- Collaborate with department leaders to proactively identify and solve challenges

02/10 – 4/14 BeQuick Software, Inc. – Software company providing hosted BSS/OSS

#### **Manager of Communication and Compliance**

- Monitor Federal and State regulations and manage the change process to ensure software compliance.
- Build relationships with partner vendors to increase revenue and provide integration options to clients.



- Manage communication and lead a team of technical writers who document the Company's systems, processes and procedures.
- Provide project management for new vendor integration and all compliance projects.

08/2006 – 02/2010 Zadak, Inc. – Privately held cemetery management

### **Business Manager**

- Created processes to meet state compliance regulations.
- Ensured records were accurate to pass state inspections.
- Developed partner relationships to increase revenues.
- Contributed to an effort that resulted in breaking all time revenue records.

10/1997 – 10/2005 Xspedius Communications – Competitive Local Exchange Provider

### **Director of Agent and Carrier Support**

- Responsible for leading teams that provided service implementation as well as post installation customer support for Agent and Carrier customers.
- Designed and managed the launch of an online ordering system for Agents.
- Managed contracts and tariffs to ensure compliance with all terms.
- Served as a top-level escalation point for customer issues.
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### **Branch Sales Manager**

- Improved revenue growth and customer retention in one of the company's largest markets.
- Provided hands on leadership that created an environment of success.
- Consistently met new monthly billed revenue goals.
- Responsible for ensuring special pricing would result in a profit to the company.

### **Regional Field Support Director**

- Managed the customer implementation process as well as the post installation experience for enterprise level customers.
- Responsible for managing a department budget.
- Recruited, hired and trained all team members.
- Built lasting relationships with large end customers resulting in increased monthly revenue for the company.

### **Regional CMS Manager**

- Created and implemented processes and procedures, such as first bill reviews and quarterly account reviews.
- Developed a training program for Customer Management Specialists.

- Developed relationships both with internal departments as well as outside vendors that resulted in my success of escalating customer issues.

### **Customer Management Specialist**

- Selected for a new key position in the company designed to ensure customer satisfaction.
- Managed customer churn rate to consistently exceed the company goal.
- Identified and assisted with correcting a major flaw with a new billing platform that was preventing a large percentage of customers from being billed.