



Douglas B. Twillman, CFA

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FRACTIONAL CFO | INTERIM CFO • COMMERCIAL REAL ESTATE FINANCE & ASSET MANAGEMENT

Strategic, execution-focused Fractional CFO | Interim CFO with 20+ years leading financial management, capital strategy, and operational performance for commercial real estate companies, sponsors, and investment platforms. Highly skilled in cash flow optimization, asset management, budgeting, FP&A, capital markets, investor relations, and financial modeling.

Known for implementing big-company financial discipline in entrepreneurial environments and leveraging AI-driven automation (financial modeling, workflow streamlining, reporting intelligence, and data processing) to reduce operating costs, accelerate decision-making, and improve organizational efficiency.

CORE COMPETENCIES

Fractional & Interim CFO Leadership • FP&A • Cash Flow Optimization • AI-Enhanced Reporting & Automation • CRE Investment Underwriting • Portfolio & Asset Management • Capital Markets & Debt Structuring • Investor Relations • ERP/Financial Systems (Yardi, Excel, Cloud) • Due Diligence • Risk Management • Process Improvement

Supplemental Expertise: Expert Witness support (Commercial Real Estate) • Standards of Care • Valuation & Damages Analysis • Forensic Accounting • Receiverships • Distressed Asset Evaluation • Commercial Leasing & Brokerage Practices • Debt Restructuring • Financial Modeling & Cash Flow Opinions across multiple asset classes

PROFESSIONAL EXPERIENCE

Dunhill Partners & Dunhill Partners West – San Francisco, CA & Dallas, TX

Fractional CFO / Principal / Sponsor | 2014 – Present

Experienced in financial operations, capital strategy, and technology modernization for a \$1B+ diversified commercial real estate portfolios concentrated in Texas and Northern California.

Key Achievements: - Directed FP&A, budgeting, cash management, asset management, investor reporting, and financial operations. Implemented AI-enhanced financial modeling, automated variance analysis, and workflow improvements - reducing reporting cycle time and improving

forecasting accuracy. Built commercial brokerage, investment, and management platforms for office, retail, and mixed-use assets totaling \$110M. As a principal - structured and capitalized multiple CRE acquisitions, including two office properties (\$55M) and a \$25M mixed-use property.

MiraVista Properties / Bluewater Real Estate Investments / Ovation Real Estate Partners – San Francisco, CA

Principal / Managing Member / Sponsor | 2003 – 2014

- Sourced, capitalized, and managed multifamily assets (197 units) across SF Bay Area and Midwest.
 - Formed seven LLCs, built financial models, designed pro forma P&Ls, authored PPMs, and raised an initial \$5M in private equity.
 - Created systematic investor reporting and portfolio analytics frameworks.
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Sperry Van Ness – Commercial Real Estate Advisors – San Francisco, CA

Managing Director & Senior Advisor | 2005 – 2009

- Co-founded and operated North Bay CRE brokerage while serving as CFO.
 - Specialized in distressed asset advisory, workouts, debt restructuring, and forensic reviews. Served on the National Asset Recovery Team during the financial crisis.
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Bohan, Bertain & Company / Triarc Property Management – San Francisco, CA

Co-Founder / CEO | 2005 – 2011

- Asset-managed 500+ units and led a team of 20.
 - Oversaw accounting systems, operational workflow, risk management, and labor compliance.
 - Specialized in receiverships, forensic accounting, and troubled debt restructuring.
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Bank of America Leasing & Capital – San Francisco & Los Angeles, CA

Principal / Portfolio Manager | 2001 – 2003

- Managed \$14B domestic & international lease portfolio; advised executive leadership on optimization strategies.
- Led development of pricing tools, hold/sell models, and UI for reporting systems.
- Served on sales/marketing strike team for UK joint venture.

Vice President, Syndications | 1998 – 2000

- Arranged and closed 25 syndication transactions totaling \$400M+.
- Conducted due diligence, valuation analysis, and capital structuring. Selected for workflow efficiency task force during NationsBank merger.

Vice President, Commercial Market Originations Officer | 1993 – 1998

- Originated ~100 transactions totaling \$200M+.
- Awarded Top Performer two years.
- Delivered structured financing solutions to middle-market clients.

Financial Consultant / Senior Financial Analyst | 1989 – 1993

- Re-engineered treasury and transfer pricing methodologies.
- Built NPV-based profitability and incentive models.

EDUCATION & PROFESSIONAL DESIGNATIONS

- CFA Charter holder – CFA Institute, CFA Society San Francisco
- MBA, Finance – University of San Francisco (1986)
- B.S., Mechanical Engineering – UC Davis (1983)
- Real Estate Broker (CA Lic. #01398055)
- General Contractor – Class B (CA Lic. #969336)
- Board Member – Strawberry Recreation District (Mill Valley, CA)
- Investment Committee Chair – Olympic Club of San Francisco (2012–2014)

TECHNOLOGY & AI SKILLS

- Yardi, AppFolio, Excel (advanced), Argus, MRI, Juniper Square, cloud accounting systems
- AI tools for workflow automation, financial modeling, forecasting, document analysis, and reporting
- Data structure design, templated forecasting systems, automated budget workflows