

LISA S. KAPLOWITZ
Rutgers University – Newark & New Brunswick, NJ
Mobile: 917-576-5150
lisa.kaplowitz@business.rutgers.edu
www.lisakaplowitz.com

EDUCATION

KELLOGG SCHOOL OF MANAGEMENT, NORTHWESTERN UNIVERSITY, Evanston, IL
Master of Business Administration, June 2001

- Dean's honor list; Salomon Smith Barney scholar; Little Family Foundation scholar

BROWN UNIVERSITY, Providence, RI

Bachelor of Arts, double major in economics and international relations, May 1995

- Varsity Gymnastics: Captain, 4-year MVP, 4-year All-Ivy, 2-year All-ECAC, 3-Year Academic All-Ivy

ACADEMIC POSITIONS

RUTGERS UNIVERSITY, New Brunswick and Newark, NJ

Co-founder and Executive Director – [Rutgers Center for Women in Business \(CWIB\)](#) 2019 - Present

- Oversee all functions and execution of CWIB. Raised over \$1.5 million, curated diverse community of over 6,500 members, hosted over 40 events, produced 5 research studies, garnered over 30 articles, podcasts and other media, developed mentoring programs for women and men, and distributed over \$150,000 in scholarship to students. Through education, opportunities and thought leadership, CWIB removes barriers, builds community, and empowers women with the confidence and skills necessary to succeed as business leaders.

Professor – Associate Professor of Professional Practice – Rutgers Business School 2016-Present

- Teaching undergraduate and MBA students the fundamentals of corporate finance and how to apply these concepts to decisions typically encountered in corporations and investment banking. Average student rating 4.61/5.00 for teaching effectiveness.

Adjunct Professor – Executive MBA; Executive Education 2019-Present

- Finance for the C-Suite
- Financial Risk Management

Adjunct Professor – Kinesiology Department – Finance in Sports 2014-2017

- Introducing undergraduate students to a practical application of corporate finance and analysis as it relates to sport-centric organizations.

PROFESSIONAL POSTIONS

KAPLOWITZ ADVISORY GROUP LLC

2013 – Present

Strategy & Finance Consultant

- Guiding founders through the initial company creation phase, including creating of a value proposition, business model, and focused strategy, as well as implement of infrastructure, timelines and capital raising processes.
- Helping early stage venture capital and private-equity backed companies create the necessary infrastructure, processes and controls to grow profitably and efficiently without getting buried in red tape or bureaucracy.
- Advising later stage and mature companies with strategic planning, including execution, implementation, alignment, prioritization of initiatives and measurement of effectiveness.
- Interim/ Part-time Pres/CFO/COO - Providing executive management support, as needed, in all functional areas, including operations, finance, legal and supply chain management.

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PROFESSIONAL POSTIONS (cont'd)

HELLO PRODUCTS LLC, Montclair, NJ

2014-2015

Chief Financial Officer & Corporate Secretary

- Interim President. Led strategic planning process, goal setting and creation of metrics to measure success. Introduced culture of accountability and results-based performance.
- Led capital raising efforts, including investor communication, documentation and agreements.
- Created and implemented internal controls, policies and procedures for accounting and operations.
- Implemented monthly financial package focused on KPIs, financial statements and summary MD&A.
- Implemented weekly cash flow tools to monitor cash balances and working capital needs.
- Created weekly dashboard to distribute to executive management team and private equity investors.
- Drafted and maintained Board of Directors minutes and resolutions.

MISS MATCHED, INC. (d/b/a LittleMissMatched), New York, NY

2010-2012

Chief Financial Officer & Corporate Secretary

\$25 million private-equity-backed multi-channel tween retailer

Responsibilities included management of Accounting, Finance, Risk Management, Legal, Merchandise Planning, Human Resources, IT, Logistics, Operations and Administration.

- **Finance & Accounting**
 - Raised over \$25 million of new capital and completed all necessary documentation and agreements.
 - Created and implemented internal controls, policies and procedures for all major accounts and journal entries, including cash, inventory, accounts receivable, accounts payable and travel & expense.
 - Signed off and reviewed all financial statements, budget and strategic plans.
 - Implemented monthly financial package focused on KPIs, financial statements and business lines.
 - Implemented daily and weekly cash flow tools to monitor cash balances and working capital needs.
 - Created weekly dashboard to distribute to executive management team and private equity investors.
 - Primary liaison with corporate and investment banks, PE firms, outside counsel and insurance brokers.
- **Operations & Administration**
 - Reorganized and restructured management team and business lines, including hiring key executives.
 - Reviewed and approved new open-to-buy and monthly business review processes.
 - Led and administered annual review process; implemented PTO policies and procedures.
 - Drafted and maintained Board of Directors minutes and resolutions.
 - Negotiated and executed contracts including leases, licensing agreements and vendor agreements.
 - Managed and processed all equity grants and documentation.
 - Conducted RFP, hired and began implementation of outsourced Virtual CIO/CTO.
 - Escalation contact for 3PL and vendor issues.

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PROFESSIONAL POSTIONS (cont'd)

BED BATH & BEYOND INC., Union, NJ

2002-2010

Director of Finance (Functioned as Treasurer)

\$10+ billion publicly-traded home furnishings retailer

Responsibilities included management of Corporate Finance and Strategy, Treasury, Investor Relations, Gift Cards, Payment Processing, Risk Management and Sales Audit Departments.

- **Corporate Finance & Strategy Department (2002-2010)**
 - Established dept. and managed investment banking activities. Created strategic plan (5-year forecast).
 - Evaluated and integrated acquisitions, including the Christmas Tree Shops and buybuy BABY.
 - Reviewed and analyzed uses of excess cash. Initiated and executed over \$2 billion of share repurchases. Created investment policy. Managed and traded \$2 billion corporate investment portfolio.
 - Negotiated coverage, terms and fees of medical, stop loss, life insurance, 401(k) and deferred compensation providers. Implemented restricted stock program.
- **Investor Relations Department (2002-2010)**
 - Oversaw Investor Relations department and led discussions with analysts and investment community. Created conference call scripts and drafted press releases and SEC documents.
- **Treasury Department (2003-2010)**
 - Oversaw Treasury department, including account management, daily funding and reconciliation, wiring, letters of credit and armored car services. Created monthly reporting, trending and variance analyses.
 - Managed investment, corporate and depository banking relationships. Negotiated contracts and fees for all cash management and Treasury services.
- **Gift Card Department (2005-2010)**
 - Oversaw Gift Card business for in-store, on-line and B2B. Negotiated contracts with processors, production companies and B2B partners. Rolled out new in-store fixture, optimized order quantities, enhanced product assortment and refined distribution process. Launched gift cards for subsidiaries and Canada.
- **Payment Processing Department (2005-2010)**
 - Oversaw Payment Processing, including all activities associated with credit cards, debit cards and checks. Renegotiated all processing contracting and consolidated under single provider and managed relationships with processor and associations. Coordinated with IT department to implement upgrades and ensure security and privacy compliance. Launched Bed Bath & Beyond MasterCard.
- **Sales Audit (2005-2007)**
 - Oversaw department responsible for recording and reconciling sales.
- **Risk Management (2002-2005)**
 - Oversaw Risk Management department and negotiated insurance renewals, managed claims and created budgets for all insurance lines, including property, workers' compensation, general liability, auto, cargo and D&O.

MERRILL LYNCH (fka Banc of America Securities LLC), New York, NY

2001-2002

Associate, Retail Group-Corporate and Investment Banking

- Assisted clients in raising equity and debt capital in the public and private markets and advised on strategic alternatives including acquisitions and divestitures. Recruited, trained and managed analysts. Served as informal mentor.

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PROFESSIONAL POSTIONS (cont'd)

SUNTERRA CORPORATION, San Mateo, CA and Orlando, FL

1997-1999

Senior Financial Analyst – Finance and Strategy

\$400 million publicly-traded vacation ownership company

- Reported to CEO. Managed transactions generating over \$500 million of public and private capital. Developed business plans and financial models for new business development and internal operations.

DEUTSCHE BANK (fka Alex. Brown), Baltimore, MD

1995-1997

Financial Analyst, Corporate and Investment Banking

JOURNAL PUBLICATIONS (NON-PEER REVIEWED)

Tolan, Colleen, Purushothaman, Deepa and Kaplowitz, Lisa (July 2024), [How to Improve Women's Advancement Programs](#), Harvard Business Review

Tolan, Colleen and Kaplowitz, Lisa (December 2023), [“3 Ways Men Can Advance Gender Equity at Work,”](#) Harvard Business Review

Kaplowitz, Lisa and Mangino, Kate (August 2023), [“Caregiving Employees Bring Unique Value to Companies, Lisa Kaplowitz,”](#) Harvard Business Review

Purushothaman, Deepa, Stromberg, Lisen and Kaplowitz, Lisa (October 2022), [“5 Harmful Ways Women Feel They Must Adapt in Corporate America,”](#) Harvard Business Review

Rutgers Business Review, Summer 2021, Volume 6, Number 2

Guest Co-Editor

Editorial Overview: Advancing Women in Business

BOOK CONTRIBUTIONS

“COVID-19 and Changes in the Gendered Division of Unpaid Labor, Job Productivity, and Job Satisfaction,” Rodgers, Y., Durante, K., Kaplowitz, L., Zundl, E., Ulu, S., and Cohen, J., [Feminist Economics: Women, Work and the Home](#), Taylor and Francis. (Accepted. Est publication - 2025)

“Five Harmful Ways Women Feel They Must Adapt in Corporate America,” Purushathaman, D., Stromberg, L. and Kaplowitz, L., [Overcoming Overwork \(HBR Women at Work Series\)](#), (Harvard Business Review Press, 2024). Grant, H., Riegel, D., Gallo, A. and O’neill, M.

“Case Study: [Instacart: Putting a Price on the IPO Share Valuation \(English version\)](#),” Kaplowitz, L., Saravanakumar, S., Dalal, K., Kapse, R., and Pinto, J., (Ivey Publishing, June 2024).

“Case Study: [Arconic Inc.: A Spin-Off of Its Global Rolled Products Business](#),” Kaplowitz, L. and Simpkins, S., (Ivey Publishing, March 2024)

“Budgeting and Forecasting: A Pharmaceutical Case Study in Financial Planning & Analysis,” Kaplowitz, Lisa, [Cases in Case Management](#), (World Scientific, 2023). Brick, Ivan E., and Poniachek, Harvey A.,

“Why Don’t Women Choose Investing Careers? The Undergraduate Pipeline, Kaplowitz, L., Gomez, O., Johnson, T., Margues, E. and McCormick, B., [Undiversified: The Big Gender Short in Investment Management](#), (Columbia Business School Press, 2021). Pages 59-69. Carr, E. and Dudley, K.

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“The Startup Graveyard-10 Lessons for Avoiding Failure and Secrets for Success,” Grossi, R., [Kaplowitz] Stern, L., Lange, G., and Rebell, D., Techventure: New Rules on Value and Profit from Silicon Valley, (John Wiley & Sons, Inc. 2001). Pages 39-54, 333-336. Gulati, R. and Paoni, A.

COMPILATION OF READINGS AND ARTICLES

Kaplowitz, Lisa and Sutton, Kyra (August 2022) “[How Companies Can Leverage ERGs in a Post- Roe World](#)”, *Medium*

Kaplowitz, Lisa and Sutton, Kyra (June 2022) [How ERGs Can Support Women Working in Hybrid Environments](#), *SHRM*

Kaplowitz, Lisa (Jun 2022), “[Title IX Increased Opportunities for Women Athletes, but There's Still Work to Do](#),” *USA Today*

Lisa Kaplowitz and Kristina M. Durante (Summer 2021), “Editorial Overview: Advancing Women in Business,” *Rutgers Business Review*

Durante, Kristina M., Lisa Kaplowitz, Yuqian Chang, and Alexis Rittweger (August 2021), “[Fathers are Feeling the Weight of Household Labor One Year into the Pandemic: Why This May Be Blessing for the Future of Women and Work](#),” *Forbes*.

Lisa Kaplowitz, Kristina M. Durante, David Smith, and Brad Johnson (March 18, 2021), “[How Men Benefit from Close Relationships with Women at Work](#),” *Forbes*.

Durante, Kristina M., Yana Rodgers, Elaine Zundl, Lisa Kaplowitz, and Sevincgul Ulu (September 22, 2020), “[The Highs & Lows of the COVID-19 Pandemic for Working Parents and the Implications for the Future of Work](#),” *Forbes*.

Durante, Kristina M., Yana M. Rodgers, Lisa Kaplowitz, Elaine Zundl, and Sevincgul Ulu (August 2020), “The Highs & Lows of the COVID-19 Pandemic for Working Parents and the Implications for the Future of Work”, white paper report for Prudential event.

Kaplowitz, Lisa (October 28, 2019), “[A Simple Lesson on the Value of Connecting](#),” Thrive Global.

Kaplowitz, Lisa (October 19, 2019), “[A Professor, A Wall-Street Analyst & A White House Staffer](#),” Medium.

Kaplowitz, Lisa (May 23, 2018), “[How to Overcome Obstacles to Strategy Execution](#),” CFO Magazine

KEYNOTE AND INVITED ADDRESSES

June 2024 – Girls Who Invest – Wharton - University of Pennsylvania, Lecturer – Corporate Finance

October 2023 – Princeton Theological Seminary – Invited Address - “Finance 201 – Own That P&L”

August 2023 – Milliken 2023 Inclusion Summit – Invited Address – “Finance 201 – Own That P&L”

August 2023 – Milliken 2023 Inclusion Summit – Keynote - “From the Locker Room to the Boardroom – How to Channel Your Inner Athlete, Even if You Never Played Sports”

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KEYNOTE AND INVITED ADDRESSES (Continued)

August 2023 – University of Indiana Evansville – Women Varsity Athletes – Invited Address - “From the Locker Room to the Boardroom – How to Channel Your Inner Athlete, Even if You Never Played Sports”

August 2023 – YWCA Evansville Women’s Equality Day Luncheon – Keynote - “From the Locker Room to the Boardroom – How to Channel Your Inner Athlete, Even if You Never Played Sports”

July 2023 – West Deptford Free Public Library – Invited Address – “Betting Buyin and Resources”

June 2023 – Women in Performance Management Annual Conference – Keynote – “From the Locker Room to the Boardroom – How to Channel Your Inner Athlete, Even if You Never Played Sports”

June 2023 – Delivering Good Gala– “Women of Impact”- Moderator for panel discussion

May 2023 – Virtual – Vertex Pharmaceuticals – “How to Make the Workplace Work for Women,” keynote workshop.

July 2022 – Virtual – Meta – “Good Guys: How Men Can Be Better Allies for Women in the Workplace,” Panelist, Moderated by Sheryl Sandberg.

Feb 2022 – TEDx Rutgers - [Advancing Women by Redistributing the Housework, One Son at a Time](#)

September 2021 – Virtual – Prudential Empowering Women Summit, “ The Role of Men in Advancing Gender Equity,” Panelist.

June 2021 - Virtual (NY, NY) – Delivering Good, “Champions of Women’s Leadership,” Moderator. Panel included Fran Horowitz (CEO, Abercrombie & Fitch Co), Congresswoman Kathy Manning (US Representative –(D-NC)), Cynthia “Cynt” Marshall (CEO, Dallas Mavericks) and Rear Admiral; (RADM) Aisha K. Mix (Assist Surgeon General, Chief Nurse Officer, US Public Health Service Commissioned Corps)

March 2021 – Virtual (New Brunswick, NJ) – Rutgers University Foundation, “Celebrating Women’s History Month,” Moderator. Panel included Shailja Dixit, SHRP’05 (CEO, ApexBio Technology and founder and CEO, Curio), Robin Li (Partner, GVV Capital) and Amy Towers (Founder of The Nduna Foundation and former COO, Glenview Capital Management)

March 2021 – Virtual (Newark, NJ) – Newark Museum, “Women Power and Promise: A Convening,” Moderator. Panel included NJ State Senator M. Teresa Ruiz, Adenah Bayoh (Essex County real estate developer and owner of IHOP Newark and Cornbread Restaurant in Maplewood), Anna Maria Tejada (Partner, Saul Ewing Arnstein & Lehr LLP and President of Executive Women of New Jersey) and Dr. Chris T. Pernell (Chief Strategic Integration and Health Equity Officer, University Hospital)

October 2020 – Virtual – Rutgers Newark Town Hall – “We Are Stronger Together,” Moderator. Panel included David Lopez (Dean, Rutgers Law School) and Dr. Jaqueline S. Mattis (Dean, SAS – Rutgers Newark)

September 2020 – Virtual - Prudential Empowering Women Summit, “ The Highs and Lows of the Covid-19 Pandemic for Working Parents and the Implications for the Future of Work,” Panelist.

Kaplowitz, Lisa (Contributed) (February 2019) “A CFO’s Guide to Asset Based Lending” (*Spoke at length, was interviewed and contributed to content*)

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KEYNOTE AND INVITED ADDRESSES (Continued)

December 2018 –New York, New York, Argyle 2018 Leadership in Corporate Divestiture and Acquisitions, "December 2018 – Argyle 2018 Leadership in Corporate Divestiture and Acquisitions - Presenter- Fireside Chat: "Approaching Mergers, Acquisitions, and Divestitures from Differing Arenas"

May 2017 - Bloomberg CEO Breakaway Conference, NY, NY – Presentation/lecture to CEOs. Summary white paper written by Lisa Kaplowitz, edited by Bloomberg

CONFERENCE PRESENTATIONS

Cohen, Jennifer, Lisa Kaplowitz, Yana Rogers, Elaine Zundl, Kristina Durante and Sevincgul Ulu (February 2024) "COVID-19 and Changes in the Gendered Division of Unpaid Labor, Job Productivity, and Job Satisfaction," *International Conference on the Economy and Gender: Women, Work, and the Home*, Autonomous University of Coahuila (Mexico).

HONORS/AWARDS

Rutgers Business School

“Dean’s Meritorious Teaching Innovations Award” (September 2022)

“Dean’s Meritorious Service Award” (September 2021)

“Dean’s Meritorious Teaching Award” (2018)

Impact Fund

“Class Action Hall of Fame Inductee” for work on Title IX (February 2022)

ROI-New Jersey (March 2021, 2022, 2023, 2024)

“ROI Influencer: Women in Business 2021 – Businesses and Organizations”

“ROI Influencer: Women in Business 2022 – Businesses and Organizations”

“ROI Influencer: Women in Business 2023 – Businesses and Organizations”

“ROI Influencer: Women in Business 2024 – Businesses and Organizations”

Paradigm for Parity (August 2020)

“Women on the Rise Award”

Brown University Athletics Hall of Fame (October 2018)

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MEDIA CONTRIBUTIONS, QUOTES, INTERVIEWS and PODCASTS

October 23 – ROI New Jersey - [Why Nobel Prize in Economics Could Have Big Impact on Wage Gap for Women](#)
March 23 – LA Times - [First Came Angel City FC. Now, Meet Monarch Collective, a New Way to Invest in Women's Sports](#)
Feb 23 – The Fix Podcast - [The Five Ways Women Lose Themselves Trying to Fit into Workplaces](#)
Aug 22 – ROI NJ – [Why Women's Equality Day Doesn't Feel That Way to Women in the Workplace](#)
Aug 22 – DiversityInc - [What Companies Are Doing to Ensure Reproductive Health](#)
Jul 2022 – HerMoney – [What's Better than "Inbox" Zero? Meet "Inbox" Useful](#)
Jun 2022 – Fortune - [Title IX's Impact on Corporate America 50 Years Later](#)
Jun 2022 – University Business - [Title IX at 50: An Uplifting Story of Perseverance and Strength in Higher Ed](#)
Jun 2022 – ABC6 Action News - [50 Years after Title IX, Girls Still Face Barriers in Sports Equity](#)
Mar 2022 – ROI NJ - [Expert Offers Advice on International Women's Day](#)
Mar 2022 – HerMoney - [13 Women Who Made Money History](#)
Feb 2022 – TEDx Rutgers - [Advancing Women by Redistributing the Housework, One Son at a Time](#)
Oct 2021 – Fundfire - [Bridgewater Bolsters Diversity Pipeline with University Tie-Up](#)
July 2021 – Bloomberg Quicktake - [Working Women Post Pandemic](#)
Dec 2020 - Bloomberg TV - [Assessing the Pandemic Impact on Women in Finance](#)
Dec 2020 – Recruiting Daily - [The Pandemic's Equity Impact, Part 2: The CEO Opportunity](#)
Nov 2020 – Recruiting Daily - [The Pandemic's Equity Impact, Part 1: Increased Lifeload, Increased Support](#)
Aug 2020 - UBS Podcast - [Five More Reasons Cash is Queen](#)
Jul 2020 - Bloomberg - [Millennial Women See Return to Trading Desks as Key for Careers](#)
Apr 2020 – ROI NJ - [Are women better suited to lead in times of crisis?](#)
Feb 2020 – ROI NJ - [Rutgers Business School launches Center for Women in Business](#)

DIRECTED STUDENT LEARNING

Honors College Thesis Advisor – 1st Reader

“Arconic Inc.’s Spin-off of its Global Rolled Products Business”

Serena Simkins

Rutgers Business School – BAIT

September 2020 – April 2021

Honors College Thesis Advisor – 1st Reader

“Paid to Play? The Legal & Financial Implications”

Dominik Gutowski

Rutgers Business School – Finance

2018

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SERVICE TO THE COLLEGE

Co-Convenor and lead organizer – Conference on Women in Hybrid and Remote Work

November 2023

– Hosted over 250 scholars, industry leaders, and innovative thinkers to participate in 10 panels and 2 keynotes to discuss experiences, barriers and next steps for those working in hybrid and remote environments and for organizations dealing with the challenges of these new work environments. Additional research originated from conference discussions.

Faculty Mentor – Men's and Women's Soccer

2023-Present

Undergraduate Curriculum Redesign Committee

Member

2022-Present

Smart Women Securities

Faculty Advisor

2021-Present

Rutgers Undergraduate Women in Business

Faculty Advisor

2018-Present

Academic Integrity Facilitator

Appointed by Associate Dean Robert Kurland

2017-2019

SERVICE TO THE DEPARTMENT

Finance Strategic Planning Committee

Member – NTT Representative

2021-Present

Finance Advisory Board

Member – Faculty Representative

2017-2023

Finance Alumni Network

Faculty Advisor

2017 – Present

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SERVICE TO THE LOCAL COMMUNITY

Brown University Sports Foundation, Providence, RI

- Board Member – 2021 – Present

Brown University Alumni Association

- Board Member – Brown Alumni Club of Central NJ
- 20th and 25th Reunion Leadership Committee
- Area Leader – Undergraduate alumni interviews, 2014-15

PowerPlay NYC, New York, NY

Board of Directors, Treasurer, 2016-2021

Fastbreak Basketball, East Brunswick, NJ

Coach, 2014-Present

Girls on the Run, East Brunswick, NJ

Coach / Mentor, 2014
