

STEFFANIE SANDERS

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OPERATIONS EXECUTIVE | LEGAL/FUND ENTITY MGMT. | ALTERNATIVE ASSET INFRASTRUCTURE

Operations executive with **30 years of progressive leadership building institutional-grade infrastructure** for alternative investment firms. Joined Värde Partners as one of its earliest hires and served as a foundational architect of the firm's evolution from a 5-person, \$500M startup to a 175-person, \$14B AUM global alternative investment manager with a global footprint (US, London, Singapore), founding and leading multiple functions including Legal Operations, Investor Services, Fund Formation, FinOps. Governed \$30M+ annual legal spend budget, managed multi-entity global structures across four offices and led the selection and implementation of technology platforms that eliminated cross-functional manual friction between 8+ departments. Public accounting background with KPMG audit roots, Lean Six Sigma discipline, and active AI workflow practice. **Known for writing the playbook where none exists, building the systems so problems don't recur, and delivering zero-error execution across sensitive legal, compliance, and personnel matters.**

TRACK RECORD BY THE NUMBERS

7 functions built from scratch

75% ↓ in # of mos. to launch a fund

\$5B+ investor capital secured/retained

\$30M annual legal budget managed

\$1M+ annual legal exp savings

1000+ hours of capacity created

50% ↓ resource drain via tech projects

60% faster RFP turnaround

50 highest # of direct reports

WHAT I BRING

Operations & Strategy: Cross-functional leadership through influence • Legal Entity Formation, Maintenance & Wind-Down • Multi-Jurisdictional Corp. Gov. • Vendor Mgmt. • SOP Design & Operational Infrastructure • Board & ELT Advisory Support

Finance & Risk: LP Onboarding, Investor Lifecycle & Reporting • Regulatory & Compliance Program Management (KYC, Form D, FINRA) • Vendor Contracting, Billing Review & Spend Governance • CPA-Grounded Financial Operations

Technology & Efficiency: Multiple Technology Evaluations, Implementations & Adoptions • SOP Design & Operational Infrastructure • Process Improvement & Automation (LSS Green Belt) • Board & ELT Advisory Support • Vendor Mgmt. & Budget Rigor • AI Workflow Deployment

PROFESSIONAL EXPERIENCE

FORGE3 ADVISORS | Minneapolis, MN

2024 - Present

Founder & Business Operations Advisor (Fractional)

Building backoffice infrastructure for founders and emerging alternative asset managers. Selected engagements:

Head of Finance & Operations (Fractional COO/CFO) | East Beach Asset Management

October 2024 - March 2026

- Built complete institutional-grade fund operations infrastructure from scratch: finance & audit framework and processes, internal controls, vendor oversight, compliance program, and operational run-books for a private credit manager in its formative stage.
- Evaluated and onboarded the firm's full service-provider ecosystem across fund administration, legal, audit/tax, cybersecurity, compliance, and insurance, **saving 200+ hours of partner time** and ensuring institutional readiness for first fundraise.
- Led all fund formation activities including project planning, DDQ preparation, outside counsel engagement, and governing document review and negotiation, **creating 150+ hours of partner capacity**.
- Reviewed and negotiated bespoke direct lending transaction documents across a complex, multi-entity structure, **reducing CIO workload by 40+ hours** while maintaining alignment with fund strategy and fiduciary obligations.
- Formalized employee onboarding and management including updating employee handbooks and legal agreements; led compliance program expansion supporting the CCO on annual testing and Form ADV updates.

Business & Fund Launch Strategist | MPowered Capital

April - December 2024

- Strategic and tactical fund launch support including drafting fund governing documents, completing ILPA DDQ updates, and fulfilling investor RFPs, **creating 60+ hours of team capacity**, and reducing outside counsel spend.

VÄRDE PARTNERS | Minneapolis, MN

Global alternative investment firm. Joined as one of the firm's earliest hires; served in progressively senior roles as a foundational contributor to the firm's evolution from a 5-person, \$500M AUM startup to a \$14B global investment manager spanning four offices across four continents.

Managing Director | Global Head of Legal, Compliance, Audit, Tax (LCAT) & Philanthropy Operations 2017 - 2024

- **Founded LCAT operations function** from scratch, owning its end-to-end operating model and governing **\$30M in annual legal spend** with full visibility and control across a globally dispersed outside counsel network.
- Developed billing guidelines and enforcement protocols, invoice review and approval, and performance accountability, **identifying \$1M+ in annual savings** while strengthening outside counsel relationships.
- Led the evaluation, selection, and implementation of an e-billing platform across a cross-functional working group, **reducing administrative workload by 25%** across multiple departments including Legal, Finance, and AP.
- Standardized complex multi-entity processes including employee investment and carry award protocols, **eliminating 40+ hours of administrative burden** through single-point-of-contact design and clear SOPs.
- Completed **four stalled, business-critical projects** in <18 mos. leading cross-functionally through influence not direct authority.
- Reduced quarterly investor letter production from 60+ days to under 45 days via Lean Six Sigma process overhaul; served as first-line compliance review, **saving approximately 15 hours per production cycle**.
- Built reporting and KPIs giving senior leadership actionable visibility into legal spend, cycle times, and service delivery; managed the firmwide intranet committee rollout and philanthropic initiative operationalization.

Managing Director | Global Head of Investor Services & Fund Formation 2010 - 2017

- Founded and led a 7-person team with full ownership of the investor lifecycle, fund launches, capital activity, reporting cycles, operational due diligence, and LP communications.
- **Key role in securing and retaining \$5B+ in investor capital** through a function built on trust, data integrity, and zero-error execution - serving endowments, public/private pension plans, family offices, sovereign wealth funds, and 501(c)(3) entities.
- Instituted a firm-wide fund launch strategy that **reduced time-to-market from 12+ months to under 3 months**, structuring SPVs, side letters, and fund vehicles with outside counsel while maintaining data fidelity across all systems.
- Led digital transformation of investor reporting: selected and implemented CRM, centralized due diligence repository, and reporting tools, **achieving 50% reduction in resource utilization** and 60% faster RFP turnaround.
- Coordinated all LP onboarding, KYC documentation, governing document negotiations (LPAs, side letters), and capital activity across a complex, multi-entity global platform.

Interim CFO | Director of Operations | Accounting Manager 1996 - 2009

- Built the entire FinOps function from inception: GAAP financial and tax reporting, budgeting and forecasting, LP income allocation, investment operations and performance metrics, and management company books and records.
- Served as Interim CFO delivering financial strategy, treasury management, vendor relationships, and audit-readiness across a complex, multi-entity structure; partnered with co-founders through early fundraising and fund launches.
- Operational right hand to the founders through global expansion from 1 to 7 offices (Minneapolis, London, Singapore, Italy, Japan, Greece, NYC), including the strategic closure of three locations to optimize costs.

ROETS JORDAN BREWERY | Minneapolis, MN

2013 - 2023

Owner & Operator

- Co-owned and operated a craft brewery for 10 years, with ownership of all financial operations, vendor relationships, and regulatory compliance. Named Best of the Best (Southwest) Brewery three years running.

KPMG | Minneapolis, MN

1994 - 1996

Audit Senior - Financial Services

EDUCATION, CREDENTIALS & TECHNOLOGY

B.S. Accounting & Finance, St. Cloud State University (Herberger Business School) **CPA**, Minnesota (inactive) **Lean Six Sigma Green Belt**, University of St. Thomas

AI & Automation: Scaling a Business with AI & Agentic Workflows (Maven) | Google AI Essentials | Outskill AI Bootcamp Masterclass & Accelerator