Jeremy Billiel

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Financial Services Executive

Seasoned, strategic finance executive with broad experience in the financial services industry across the entire finance domain.

Consistent history of jobs with increasing responsibilities, assembling high-performing teams, and streamlining finance functions through process enhancements and implementing new systems and controls. Strong collaborator with Private Equity ownership, investment and risk functions, and board of directors to optimize earnings, capital management and liquidity. Skilled relationship builder, adept at liaising across matrixed organizations and external business relationships by demonstrating excellent leadership, communication, and interpersonal skills. Strong knowledge of financial markets, investment management, risk management, M&A and banking in both public and private companies.

Areas of Expertise

- Capital Markets
- Mergers & Acquisitions
- Investment Management
- Liquidity Stress Testing
- Budgeting & Forecasting
- Cash Flow Management
- P&L Management
- Rating Agency Management
- Financial Process Optimization

Key Career Highlights

- Implemented over $3B in new debt financing, hedging and repo arrangements by cultivating relationships with over 25 banks.
- Posses significant Capital Markets knowledge by negotiating and closing multiple, large Revolving Line of Credit lines and Term Loan A syndications. Spent considerable time pre-marketing securities in the Term Loan B and 144a High Yield markets.
- Successfully established investment grade issuer credit ratings for Talcott Financial Group, while increasing the credit ratings of the subsidiary insurance companies.
- Managed $15B Insurance Company Mutual Fund Substitution Order with the SEC, the largest on record, by showcasing regulatory compliance and financial management expertise.
- Developed and implemented multiple complex systems over career including general ledger conversion (Oracle), financial reporting systems (Hyperion) and Treasury management systems (FIS).

Career Experience

TriPoint Advisors LLC, Hartford, CT

TriPoint Advisors is a boutique firm focusing on helping small to mid-sized companies with advisory and fractional CFO services.

President and CEO — 2024 – Present

Researched marketplace, created LLC and launched new financial consulting firm to help clients with financial matters leveraging my extensive experiences.

- Established company, onboarded clients and on-plan to hit year 1 goals for the firm.

Talcott Financial Group, Hartford, CT

Talcott Financial Group, previously known as Hartford Life Insurance Company, is a large multi-national, Private Equity owned Life Insurance Company with $160 billion dollars in assets and more than 1 million customers. Recruited to be Treasurer for the newly created company and challenged to implement a new treasury system, new controls, build a new team, get the company ratings increased and re-enter the capital markets to secure new debt financing.

Vice President, Group Treasurer — 2018 – 2024

Managed complete spectrum of treasury functions, including forecasting, accounting, cash/debt management, account reconciliation, capital markets transactions, bank and rating agency relations.

- Established and lead a dynamic 12-member Treasury team following the separation from The Hartford.
- Established a stringent Treasury control environment aimed at supporting annual audit requirements.
- Talcott ACE Award winner for developing and implementing new Treasury Management System (FIS Integrity).

- Secured new debt financing by elevating company ratings and successfully re-entering capital markets.
- Attained notable rating upgrades through excellent management of relationships with Rating Agencies.
- Contributed to driving business growth by steering M&A activities totaling over $50B in the past 24 months for firm.
- Improved liquidity by establishing and overseeing intercompany lending lines across 10+ international companies.
- Optimized cash flows by integrating with enterprise risk and investment teams.
- Support effective administration of company's retirement savings plan by leading 401K committee.

Hartford Investment Management Company (HIMCO), Hartford, CT

HIMCO, a subsidiary of The Hartford Insurance Company, is a leading U.S. asset management firm with $100 billion dollars in assets under management. Promoted to lead all financial activities for the company and Treasurer of HIMCO Variable Insurance Trust mutual fund platform.

AVP, Head of HIMCO FP&A, and Treasurer of HIMCO Variable Insurance Trust (HVIT) 2013 – 2018

Streamlined financial processes and ensured compliance with regulatory requirements by serving as Treasurer for HIMCO Variable Insurance Trust mutual fund platform. Drove business growth by implementing additional financial discipline, outsourcing finance work offshore, and partnering with institutional businesses. Ensured on-time completion of all HVIT mutual fund financial matters, including shareholder reporting, oversight of external administrator, annual audits, distributions, 15c, and communications to Audit Committee.

- Reduced expense analysis time by 25% through automation of investment expenses in corporate systems.
- Aligned employee incentives with corporate goals by developing and reporting HIMCO bonus scorecard metrics.
- Provided invaluable strategic financial guidance to support decision-making by acting as a Business Partner to CIO.
- Eliminating over $20M (15%) in expenses over three years by performing peer analysis, rectifying the inefficiencies and creating KPIs for the business to manage to.
- Hartford Chairman Award winner as a key contributor in managing $15B Insurance Company Mutual Fund Substitution Order with the SEC, the largest on record, by showcasing regulatory compliance and financial management expertise.
- Strengthened financial conditions of firm by saving over $2M (10%) in annual vendor spending through rigorous negotiations while adding additional protections into contracts.
- Enabled HIMCO to focus on core clients and responsibilities by shutting down underperforming businesses and streamlining HIMCO FP&A department by eliminating two positions (33%).
- Hartford Chairman Award winner as a key contributor in creating a Japanese Investment Management Company to manage Japanese insurance liabilities.

Additional Experience 2000-2012

- The Hartford Insurance Company - Director of 3rd Party Data/Vendor Management
- The Hartford Insurance Company - Director of Homeowners Insurance
- The Hartford Insurance Company - Property and Casualty Insurance Specialty Product Manager
- The Hartford Insurance Company - Property and Casualty Insurance Financial Analyst
- ING Investment Management - Senior FP&A and Business Intelligence Manager

Education & Certifications

- Master of Business Administration (MBA) Candidate - Bryant University, 2025
- Certified Treasury Professional Certification (CTP) – Association for Financial Professionals (AFP), 2024
- Bachelor of Science in Business Administration in Finance – University of Connecticut, 2002

Professional Activities & Community Involvement

- Board Member and Treasurer of Purple Tree Café (2024 – Current)
- Boy Scout Troop 39 Scoutmaster (2020 – Current)
- Marlborough Youth Athletic League Coach (2016 –2020)
- Board Member and Treasurer of New England Region Sports Car Club of America (SCCA) (2006-2012)
- Director and Treasurer of NER Investments, LLC (2006-2012)