

Jacob W. Holtz

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EXECUTIVE PROFILE

Strategic finance and operations leader with 12+ years of experience in budgeting, forecasting, P&L management, and financial analysis supporting executive decision-making. Proven ability to translate complex operational and financial data into actionable insights for senior stakeholders and C-level executives. Skilled in advanced Excel, financial modeling, reporting, and process optimization. Experienced in leading high-performing, multi-level teams and driving cross-functional initiatives that improve efficiency, profitability, and decision-making. Recognized for exceeding revenue and NOI targets and delivering measurable impact in dynamic environments.

EXPERIENCE

University Center, Chicago, Illinois (2014–Present)
Senior Director (PeakMade Real Estate) (2022–Present)

- Develop and execute the overall business strategy for University Center, a 1732 bed, \$200M+ asset.
- Lead full P&L budgeting, reforecasting, cash flow forecasting, and capital planning, aligning performance with investor return objectives.
- Drive NOI growth through strategic partnership with onsite and corporate teams; exceeded controllable NOI targets by \$1.58M (8.9%) in 2025.
- Lead all AME processes, including P&L review, variance report, and cash forecasting.
- Advise senior executives and investors by presenting strategic initiatives and converting complex financial and operational data into clear, decision-ready insights.
- Build and maintain advanced financial models in Excel to support forecasting, performance analysis, data presentation, and decision-making.
- Lead business systems and process improvement, enhancing efficiency, scalability, and reporting accuracy.
- Lead and develop a 9-member, multi-level and cross-functional team spanning Associate through Director levels across Operations, Sales, and Technology.
- 2022 Pinnacle Award, given to recognize an individual for outstanding achievement over a long period of time.

Director of Sales and Operations (PeakMade Real Estate) (2018–2022)

- Developed and delivered financial and operational reports, providing actionable insights for senior stakeholders.
- Led operational improvements that reduced staff workload, enhanced client experience, and increased revenue.
- Partnered cross-functionally to design, implement, and scale new strategic initiatives across the organization.
- Negotiated complex B2B client and vendor agreements, mitigating risk and protecting business interests.
- Presented at StarRez Conferences, sharing operational strategies and improvements with industry peers.
- 2020 Circle of Excellence—For achieving overall success while overcoming unique challenges.

Director of Housing and Conference Services (PeakMade Real Estate) (2017–2018)

- Led financial and operational transition to new ownership and management, ensuring continuity and stability.
- Analyzed complex contractual and financial data to inform financial decision-making and forecasting.
- Managed Master Lease client relationships representing \$22.5M in revenue.
- Established vendor contracts, systems, and accounting practices to support new organizational structure.

Assistant Director of Conference Chicago (CBRE, Inc.) (2015–2017)

- Exceeded budgeted revenue goal by 23%.
- Developed a scalable Excel revenue dashboard, transforming 160,000+ rows of data into actionable insights.
- Delivered operating, financial, and statistical reporting to support management decision-making.

Sales Manager (CBRE, Inc.) (2014–2015)

- Exceeded yearly sales goals by 29%.
- Managed all aspects of sales funnel—prospecting, contracting, and customer retention.

CORE COMPETENCIES

Strategic Planning | Budgeting & Forecasting | P&L Management | Financial Modeling & Analysis | Executive Reporting
Advanced Excel | Operational Efficiency | Team Leadership | Technology Integration | Effective Communication

EDUCATION

University of Wisconsin-Stout (2012)
Major: Hotel, Tourism and Restaurant Management
Second Major: Golf Enterprise Management

Southern Cross University–Australia (2010)
Area of study: Tourism Management
Study abroad program