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### Education:

Master of Business  
Administration (MBA) –  
University of Delaware

MS Business Analytics &  
Information Management (MIS) –  
University of Delaware

ZHAW School of Management  
and Law – Business  
Administration & Management

Bachelor and Master of Arts  
(Music Performance) – University  
of Applied Sciences and Arts  
Northwestern Switzerland  
(FHNW)

### Professional Qualifications:

Certified Valuation Analyst®  
(CVA)®

Sergio is a Business Valuation and Investment Banking Analyst at Baldwin & Clarke Corporate Finance, LLC specializing in the valuation of fractional and controlling interests in closely held companies for legal purposes and in connection with mergers and acquisitions. He is responsible for all facets of performing appraisals including collection of information, financial history and analysis, industry research and analysis, implementation of valuation approaches, and documentation of findings.



Sergio performs business valuations for closely held companies for numerous purposes including estate and gift tax planning, sales of companies, recapitalizations, shareholder buyouts, Employee Stock Ownership Plans, succession planning, and financial management and planning. He conducts valuations of companies in diverse industries such as precision manufacturing, food retailing and wholesaling, investment management, real estate management, construction services, transportation, and technology, among others.

Prior to joining BaldwinClarke, Sergio worked in business consulting, specializing in business ownership transitions with an emphasis on valuations and M&A of privately held businesses. Earlier in his career, he served as a Senior Associate at JPMorgan Chase and co-founded and managed the financial operations of a private business in Switzerland.

Sergio holds the Certified Valuation Analyst® (CVA®) designation from the National Association of Certified Valuators and Analysts (NACVA), having met rigorous standards in education, experience, examinations, and report submission. He earned a Master of Business Administration (MBA) in Finance, a Master's in Business Analytics and Information Management from the University of Delaware, and a Bachelor's in Business Administration from the Zurich University of Applied Sciences in Switzerland.