

Francisco J. Rodríguez-Castro

CHFP · CSBI · CRCR · CSAF · CSPR · CSPPM

President & Chief Executive Officer

Corporate Finance · Investment Consulting · Banking · Healthcare
Birling Capital Advisors, LLC

San Juan, Puerto Rico

frc@birlingcapital.com

787-247-2500

www.birlingcapital.com

Professional Profile

Francisco Rodríguez-Castro is the founder, President, and Chief Executive Officer of Birling Capital Advisors LLC, one of Puerto Rico's premier corporate advisory and investment banking firms, since 2015. With over 25 years of distinguished experience spanning government, multinational corporations, and public companies, he has established himself as one of the most respected voices in Puerto Rico's business and financial community.

Throughout his career, Mr. Rodríguez-Castro has structured and executed **more than \$10 billion in transactions** across municipal finance, corporate and commercial lending, asset-based lending, AFICA bonds, and mergers and acquisitions. He previously served as President and CEO of the Economic Development Bank for Puerto Rico and as Managing Director at UBS International, among other C-level positions in the international and local banking sector.

A prolific author and public intellectual, Mr. Rodríguez-Castro writes the Think Strategically™ column and maintains the Birling Capital Global Market Square, a daily financial intelligence platform delivering data-driven analysis on Puerto Rico's economy, capital markets, and governance. He is also the Chairman and Founder of the Puerto Rico Conference 2026: Transformation + Innovation + Growth, co-presented by Birling Capital Advisors, the Puerto Rico Chamber of Commerce, and El Nuevo Día.

Finance & Investment Banking

Mr. Rodríguez-Castro's investment banking career spans municipal, corporate, and commercial finance, with senior leadership roles across international and local banking. He has been Managing Director at UBS International, President & CEO of the Economic Development Bank for Puerto Rico, and has held senior lending positions throughout the corporate banking sector.

- Structured and executed over \$10 billion in Municipal Finance, Corporate, Commercial, Asset-Based, AFICA, and Mergers & Acquisitions transactions.
- FINRA Series 7 (General Securities Representative) and Series 63 (Uniform Securities Agent State Law) licensed, qualified to solicit, purchase, and sell corporate securities, municipal fund securities, options, direct participation programs, investment company products, and variable contracts.
- Produces the Birling Capital Puerto Rico Stock Index and U.S. Bank Index, proprietary market benchmarks tracked in the firm's daily Global Market Square publication.
- Advises institutional, government, and corporate clients on capital markets strategy, restructuring, and economic policy across healthcare, banking, insurance, government, and education sectors.

Healthcare Finance

Mr. Rodríguez-Castro is a Certified Healthcare Financial Professional (CHFP) and has a deep understanding of healthcare finance. The CHFP certification demonstrates knowledge and expertise across four essential pillars: business acumen, collaboration, financial strategy, and an understanding of future trends.

Mr. Rodríguez-Castro is also a Certified Specialist in Business Intelligence (CSBI), a certification offered by the Healthcare Financial Management Association (HFMA), designed to validate expertise in using data analytics to improve healthcare financial performance. It focuses on applying business intelligence tools to healthcare revenue cycle management, financial reporting, and compliance.

He holds six advanced certifications from HFMA in total and has advised healthcare organizations including the Puerto Rico Association of Hospitals (ASPPR) on banking and market matters and the Asociación de Salud Primaria on financial and legislative strategy and developed the Planificador Financiero de Salud Primaria (PFSP) certification program.

Professional Certifications — Healthcare Financial Management Association

Mr. Rodríguez-Castro holds six advanced certifications from the Healthcare Financial Management Association (HFMA), the leading professional organization for healthcare finance executives. This exceptional portfolio of credentials reflects both breadth and depth across the full spectrum of healthcare financial management.

CHFP

Certified Healthcare Financial Professional

Mastery across four critical pillars: business acumen, financial strategy, cross-functional collaboration, and future-focused planning. The benchmark certification for healthcare finance executives.

CSBI

Certified Specialist in Business Intelligence

Validates expertise in leveraging data analytics and business intelligence tools to optimize healthcare financial performance, revenue cycle management, financial reporting, and regulatory compliance.

CRCR

Certified Revenue Cycle Representative

Demonstrates comprehensive knowledge of the healthcare revenue cycle, including patient access, billing, collections, denials management, and compliance with payer requirements.

CSAF

Certified Specialist in Accounting and Finance

Advanced proficiency in healthcare accounting principles, financial statement analysis, cost reporting, capital financing, and generally accepted accounting practices within healthcare organizations.

CSPR

Certified Specialist in Physician Practice Revenue Cycle

Expertise in the unique financial and operational dynamics of physician practice revenue cycle management, including coding, billing workflows, and practice-level financial optimization.

CSPPM

Certified Specialist in Patient Financial Communications

Specialized knowledge in patient financial communications strategies, price transparency, financial assistance programs, and best practices for patient-centered billing and collections.

Education

- Babson College, F.W. Olin Graduate School of Business — OPM Entrepreneurship Program, 2020–2021
- Catholic University of Puerto Rico — Bachelor of Business Administration, 1985–1987
- Louisiana State University, 1981–1984

Board Memberships & Civic Leadership

- **2026–Present:** Chair, P.R. Chamber of Commerce Banking, Finance, and Credit Unions Committee
- **2024–2025:** Small Business Administration Regulatory Board, Washington, D.C.
- **2021–Present:** Babson College Alumni Ambassador Board
- **2005–Present:** Founder & Chairman, Puerto Rico Conference
- **2005–2023:** Puerto Rico Chamber of Commerce, Director
- **2005–2015:** UBS Group Managing Board
- **2005–2013:** Securities Industry Association, Chair
- **2005–2010:** Society of CPAs Foundation
- **2007–2014:** University of Miami, Herbert School of Business
- **2007–2013:** Ponce Museum of Art, Capital Campaign
- **2009–2013:** Jane Stern Community Library Foundation
- **2006–2013:** Private Sector Coalition, Founder and Chair
- **2002–2005:** Economic Development Bank for Puerto Rico, Board Member
- **2002–2005:** Puerto Rico Finance Board, Vice-Chair
- **2002–2005:** Puerto Rico Commerce and Export Corporation, Chair
- **2002–2005:** Fund for Innovation and Development of Agriculture (FIDA)
- **1991–1995:** Risk Management Association, Chair, Puerto Rico Chapter
- **1990–1996:** Chairman, Catholic University President's Advisory Council

Publications & Media

- Author of the Think Strategically™ column, published weekly in The Weekly Journal.
- Frequent contributor to Puerto Rico's leading Spanish and English-language media, including El Nuevo Día, El Vocero, News is my Business, and The Weekly Journal.
- Recurring contributor and guest host on Jugando Pelota Dura Radio and TV.

- Maintains the Birling Capital Global Market Square, a daily financial intelligence platform delivering market briefings, monthly economic reports, and thousands of proprietary publications to institutional clients and media worldwide. He also created the Government Progress Index (GPI), a proprietary 16-variable index scored on a 0–50 scale — with economic indicators weighted double — that tracks institutional and economic progress for both the President and the Governor, alongside its companion Puerto Rico Energy & Institutional Index (EII) and the Birling Capital Puerto Rico Stock Index and U.S. Bank Index.

Awards & Recognition

- **2017** Chamber of Commerce President's Award for Outstanding Service
- **2010** President's Award, Puerto Rico Chamber of Commerce
- **2009** Caribbean Business Person of the Year Private Sector
- **2009** President's Award for Outstanding Service, Puerto Rico Products Association
- **2009** Home Builders Achievement Award
- **2008** President's Award for Outstanding Service, Puerto Rico Chamber of Commerce
- **2008** El Vocero Newspaper Leaders Award
- **2006** Top Management Award, SME Banker of the Year
- **2006** Zenit Awards Banker of the Year, Puerto Rico Chamber of Commerce
- **2004** Banker of the Year, Puerto Rico Products Association
- **2004** Zenit Award Public Service, Puerto Rico Chamber of Commerce
- **2004** Mercury Award Banker of the Year, Centro Unido de Detallistas
- **1994** Risk Management Association Chairman's Award

