

EXECUTIVE SUMMARY

A **finance, accounting, and administrative leader** with 27 years of work experience in the fields of medicine, transportation, financial services, and public accounting. An expert in accounting, finance, hiring, strategic management, and performance reporting with an MBA, active CPA licenses, and Big 4 CPA experience.

FUNCTIONAL EXPERTISE

- Full Cycle Accounting Management
- Financial Planning, Forecasting, and Strategy
- Human Resources, Technology, & Administration
- Leading People and Organizational Change
- Business Analysis and Performance Reports
- Internal Controls and Policies

FUNCTIONAL EXPERTISE DEMONSTRATED

STRONG GUYS MOVING

October 2020 – September 2021

A transportation, moving, and relocation business affiliated with Austin-based Travel Lines with 3 storage facilities, a fleet of 40 trucks, 50 employees, and ~\$6mm in annual revenue.

Controller and Finance Manager

Oversaw all accounting and financial functions for the Firm, designed and implemented process improvements and best practices, performed operation and profitability analyses, and led strategic initiatives as needed.

- **Full Cycle Accounting Management:** Successfully oversaw all accounting activities, leading a three-person accounting team and performing month/year-end close activities, general ledger management, cash management, variance analyses, and account reconciliation duties using a proprietary accounting platform.
- **Financial Planning, Forecasting, and Strategy:** Led the preparation of a weekly performance report and shared it with company leaders, regularly tracking specific KPIs to monitor performance. Regularly analyzed the margins of individual jobs and clusters of jobs to elicit strategic insights and help guide sales efforts.
- **Leading People and Organizational Change:** Leveraged findings from the Travel Best Practices Group to implement a performance-based sales management program and led a workplace culture improvement initiative that increased employee engagement and made the Company a better place to work.

JONES CENTER FOR WOMEN'S HEALTH

September 2016 – February 2020

A women's health clinic in Boston, Massachusetts with ~\$5mm in annual revenues and 30 employees including doctors, nurses, and clerical staff that provides medical and wellness services for ~3,000 patients per year.

Accounting Manager, CFO, and Chief Administrator

Led all accounting, finance, and administrative functions, managing budgets, controlling accounting systems, conducting regular analyses and reporting findings and built great teams by hiring and managing well.

- **Full Cycle Accounting Management:** Successfully led all accounting duties for the Clinic, including the management of a 3-person accounting team, leadership of month/year-end closes, duties pertaining to the complexities of billing in a medical environment, budget management, and reporting on Clinic performance.
- **Leading People and Organizational Change:** Transformed the organization by managing the search for 10 strategic hires, qualifying candidates, conducting behavioral interviews, and onboarding the new talent. Ultimately led to the creation of an outstanding and high-performing team.
- **Business Analysis and Performance Reports:** Produced ongoing and ad hoc analyses to support the decisions of the Board, set the agenda of the monthly leadership meeting, prepared reports on important

trends, internal performance metrics, and financial health, and presented these findings to key stakeholders.

- **Internal Controls and Policies:** Revamped and then maintained the Clinic's Employee Handbook, designing workflows for the lab, the front office, and the back office teams, patient payment policies, and internal controls for the accounting and finance systems.

FAMILY MEDICINE RESIDENCY OF CALIFORNIA

October 2012 – September 2016

A non-profit program with \$11mm in annual funding and 115 employees that facilitates residency and surgical practicums for medical students and provides health services for ~15,000 low-income patients per year.

Director of Finance and Administration

Successfully led all finance, accounting, and administrative functions, managing seven direct reports, providing analysis and advice to the Board and to key stakeholders, and recruiting and onboarding new talent.

- **Full Cycle Accounting Management:** Oversaw all accounting and finance functions including the management of a 12-person accounting team (4 direct reports), leadership of month/year-end closes, performance of variance analyses, and project budget tracking/management.
- **Financial Planning, Forecasting, and Strategy:** Regularly prepared financial reports and performance reports and also led multiple strategic projects, including the development of a long-term business plan that was ultimately approved by the Board and used to secure a \$450,000 grant to upgrade the Program's technology.
- **Human Resources, Technology, and Administration:** Fostered a high-performing workplace by recruiting top talent (oversaw ~40 hires) and by spearheading strategic projects. E.g. led a systems conversion in 2005, implementing Great Plains (MS Dynamics) and retiring the previous platform (MegaWest).

PREVIOUS ROLES

Accounting Manager— Jones Family Medicine (May 2006 – October 2012)

Certified Public Accountant—Sam Abell CPA (January 2004 – April 2006)

Interim Accountant—Accountants on Demand (March 2001 – July 2004)

Assistant Controller—Commonwealth Equity Trust (February 2000 – February 2001)

Tax Accountant and Auditor—Beetle, Baskin, and Bunce CPAs (October 1997– January 2000)

Contract Accountant—Deloitte (August 1995 – October 1997)

EDUCATION

Master of Business Administration. California State University (San Francisco, California)

BS (Business Administration, Focus: Accountancy). University of Texas (Austin, Texas)

PROFESSIONAL CERTIFICATIONS

Certified Public Accountant (California) License No. 12345

Certified Public Accountant (Texas) License No. 1234

OTHER RELEVANT INFORMATION

Selected Software Skills: MS Excel (Advanced User), MS Dynamics (Great Plains), Sage/Peachtree, QuickBooks

Leadership and Awards: Outstanding Leadership and Service Award (Idaho Medical Group Management Association), 2010 President (Idaho Medical Group Management Association)