

FNAME LNAME

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ACCOUNTING EXECUTIVE - CONSULTANT

Finance Transformation ✧ Transformation Management ✧ Strategic Analysis

Combine astute strategic, business, and analytical skills with a 10 year track record of designing and operationalizing financial reporting databases. Utilizes creative ideation methods to develop, implement and positively transform productivity, operations, cost levels and compliance with regulatory agencies. Consistently recognized by executive management for talents in troubleshooting, innovative problem resolution, process analysis and high productivity. Champions an environment of transparent communications that welcomes feedback and inspires teams to excel. Extremely competent at including the human element when assessing operations and processes. Decisive, versatile and used to multitasking. Advanced skills in MS Office Professional.

ESSENTIAL EXECUTIVE STRENGTHS

- ◆ Conceptual Design / Financial Reporting
- ◆ Operations and Financial Analysis
- ◆ Planning and Forecasting
- ◆ Process Improvement
- ◆ Business Performance
- ◆ Implementation Strategies
- ◆ Risk Management
- ◆ Project Management
- ◆ Six Sigma
- ◆ Internal Controls

KEY ACCOMPLISHMENTS

- ✓ Recognized with a “Fast Start” award from Brown & Jones for completing a \$1.3M proposal in only three days.
- ✓ Received an achievement award for Expertise in Six Sigma work at an insurer.
- ✓ Awarded “Most Billable Financial Consultant” in 2000 and 2001 and “Financial Consultant of the Year, 2001” while at Cosgro.
- ✓ Reduced generation time for a cost-per-unit report from three days to six hours for Toyota.
- ✓ Developed and delivered a budgeting system to Toyota; reduced annual budget preparation time from seven days to four days.
- ✓ Increased throughput 25% on the scanning, tracking and archiving of paper based claim documentation for a major insurer while at RSM.
- ✓ Designed and implemented a process that would generate the elimination/adjusting entry for intercompany sales in a form usable on the company Income Statement.

PROFESSIONAL EXPERIENCE

Brown & Jones, Inc., Minneapolis, Minnesota

2007 – 2010

SENIOR ASSOCIATE (2008 – 2010)

Recruited to review and research insurance claims and policies for compliance with state statutes and regulations. Reviewed benefit levels, third party liability, underpayments and inaccurate coding. Accomplishments included:

- ◆ Preparation of a billable hours estimate for a \$1.3M RFP covering eight separate examinations in only three days, reducing preparation time by 50%. Results were available in both detail and consolidated form.
- ◆ Decreased title insurance calculation time 50% by developing a more efficient program.
- ◆ Improved throughput 25% by reengineering procedures for processing paper based claim documentation.
- ◆ Eliminated two days of labor with the creation of an Excel Pivot Table to reconcile documents received.

MANAGER (2007 – 2008)

Charged with designing, implementing and customizing the budgeting, planning and financial reporting databases in Cosgro solutions to meet customer requirements. Installed software on client systems and developed/maintained documentation for custom-built financial applications. Instructed system administrators, trainers and other consultants in the use and administration of Cosgro. Additionally:

PROFESSIONAL EXPERIENCE (CONTINUED)

- ◆ Brought Toyota on-board as a client for RSM and designed a Cosgro system that decreased the amount of time required to produce the engine/transmission cost-per-unit report from three days to six hours.
- ◆ Designed and implemented a Cosgro based annual budgeting system for Toyota; reduced budget preparation from seven days to four days.
- ◆ Authored and presented classes to clients in the use of the Cosgro system.

Cosgro Incorporated, Burlington, Massachusetts

1998 – 2006

PRINCIPAL CONSULTANT

Designed financial software databases on a customer specific basis, installed software on client systems and prepared and maintained documentation. Instructed client system administrators on usage. In addition:

- ◆ Designed and installed a system that would generate the elimination/adjusting entry for intercompany sales in a form usable by the Cosgro Contributor system.
- ◆ Designed and implemented a segmented income statement without using excessive account and company mapping. The system replaced an Access Database with integrated Excel spreadsheets and allowed drill-down capabilities.

Hedge, Inc., Mount Washington, New York

1997 – 1998

FINANCIAL SOFTWARE CONSULTANT

Recruited to resolve portfolio issues by coordinating changes with the HedgeWare programming staff. Maintained databases on certain hedge funds and audited holding percentages and transactions for accounting. Verified actual holdings and the timing within the hedge funds. Additionally:

- ◆ Contributed to the documentation of tax return preparation procedures; prepared hedge fund tax returns.

Westinghouse, Fairfield, Connecticut

1990 – 1997

SENIOR ANALYST - DATA MANAGEMENT

Provided accounting advice, co-administered the \$272B global financial database, maintained operational responsibility for a financial reporting database, to include consolidations, process automation and final approval for the annual report. Trained new employees in system operation and liaised with the Federal Reserve Bank. Also:

- ◆ Saved \$60,000 annually by coordinating information used in acquisitions/dispositions between corporate staff, in-house legal departments and outside law firms.
- ◆ Designed a database to track \$187B of global assets and investments.

Westinghouse, Stamford, Connecticut

1987 – 1990

CONTROLLER - GE PENSION TRUST

Provided accountability for a \$21B Pension Trust Ledger, maintained a \$3.5B database of fixed income securities, audited \$1.5B of externally managed trusts and resolved \$20M of past due mortgage-backed receivables. Designed and documented a system to resolve outstanding receivables for fixed income investments, equity dividends and private placement holdings.

EDUCATION

Bachelor of Science, Accounting
University of Southern Colorado, Pueblo, Colorado

CERTIFICATIONS / PROFESSIONAL AFFILIATIONS

Certified Public Accountant (Inactive)
Certified Management Accountant (Inactive)
Six Sigma Green Belt (Inactive)