

ERIK J. LUNDQUIST

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ENTREPRENEUR, BUSINESS MANAGEMENT EXECUTIVE, EDUCATOR

Strategic Planning | Board Leadership/Consulting | Business Consulting | Training & Mentorship

Entrepreneur and accomplished business leader with more than 25 years of demonstrated success taking both new startups and well-established firms to the next level in technological advancement, financial performance, sustainable change, ROI and revenue growth. Aspiring to leverage broad corporate acumen with extensive strategic, entrepreneurial, board governance and leadership experience in a leadership, consulting or educational role.

SUMMARY OF QUALIFICATIONS

- ◆ Visionary Leader with high emotional intelligence and a rare mix of strategic, technological, financial, operational and business development expertise, combined with a true talent for leading businesses in pioneering new directions through new system development, cutting-edge technology implementations, innovation, and strategic partnerships.
- ◆ Known as a “straight shooting”, empathetic and influential leader who builds and mentors high-performance management teams while empowering a cohesive culture of accountability and trust that motivates teams toward a common purpose.
- ◆ Creative and incisive problem solver with a proven track record of collaborating effectively with stakeholders and executives, leveraging subject matter expertise on strategy, ROI and business development efforts.
- ◆ Engaging presenter, mentor, educator and public speaker with hands-on experience providing training and education to cross-functional, diverse teams.

AREAS OF EXPERTISE

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|-------------------------------------|-----------------------------|--------------------------------|
| ▪ Business & Financial Modeling | ▪ Human Resource Management | ▪ Training & Development |
| ▪ New Technology Implementation | ▪ Budgeting & Forecasting | ▪ Sales & Business Development |
| ▪ Accounting & Financial Management | ▪ Private Equity Investment | ▪ Public Speaking/Presentation |
| ▪ Holacracy® Implementation | ▪ Board Governance | ▪ Strategic Planning |

PROFESSIONAL EXPERIENCE

Astrup Companies

Mendota Heights, Minnesota

President - Shared Services

Sep 2017 - Present

Leverage strategic insight directing the newly formed division to provide back-office services for five operating companies of the organization while establishing a more cohesive and cost-effective way of managing the companies.

- Facilitate the groundwork for the division as well as prepare for the transition to the next generation of family ownership.
- Establish organizational policies, goals, and activities; ensuring continuing operations to maximize returns on investments and increase productivity.
- Oversee all human resources activities, including the approval of human resource plans, selection of

directors and other high-level staff, as well as the establishment of major departments.

Smart-HR

Rochester, Minnesota

Founder & Chief Executive Officer (CEO)

Jan 2012 - Sep 2017

Established and directed the outsourcing company from initiation with a focus on providing HR services and technology to independent businesses and pharmacies across the US. Integrated into Astrup Companies to support growth and need for internal HR function.

- Developed and led the company from nil to \$1.2M in revenue along with a team of 12 skilled staff.
- Strategized and oversaw all aspects of the business, from contract negotiation, technology implementation, and hiring to capital acquisition and business development.
- Integrated the self-management philosophy, Holacracy®, over a three-year period as the company's new management structure.

Astrup Companies

Austin, Minnesota

Chief Financial Officer (CFO)

Sep 2009 - Jul 2016

Led the overall headquarters functions for all the operating companies, including the management of human resources, accounting, treasury management, compliance, and information technology.

- Facilitated the company during rapid growth by establishing all the departments from the ground-up, including building an entirely new treasury management system for a cash-intensive wholesale operation. This involved the creation of an automation system to properly process claims and to reconcile claims against payments received from insurance companies and pharmacy benefit managers.
- Led the dynamic growth of the accounting department from 3 to 15 personnel over the period of six years. Spearheaded the implementation of a new ERP system to create a more integrated environment around company's accounting technology and general ledger.
- Built the human resources department from 0 to 5 employees. Implemented an HRIS system that included payroll, benefits administration as well as licensing and compliance management.
- Led the successful roll-out of a company-wide email and exchange server as well as a claims recognition system along with two new pharmacy systems, one for company's long-term-care operation, and the other for the retail pharmacies.
- Facilitated the back office development to facilitate the company's growth from 225 employees and \$65M in revenue to over 475 employees and \$412M in revenue.

Merrill Lynch

Minneapolis, Minnesota

Resident Director

Jan 2006 - Sep 2009

Assumed the responsibilities as Manager and Financial Advisor; directed the Rochester Office and the advisors, reviewing all investment trades in the office and ensuring the advisors received proper training and licensure.

- Headed the recruitment of new advisors providing them training while integrating them into the Merrill Lynch system.
- Managed the employee relations with the support staff, management, and compliance support staff.
- Exceeded the regional performance and recruiting goals throughout the tenure.

PMD Coach

Jan 2004 - Jan 2006

Trained and mentored new financial advisors hired by Merrill Lynch, meeting regularly with new trainees while working with them to review their performance and assisting them in providing advice and guidance to potential clients.

- Scheduled regular weekly training meetings covering a variety of topics to train new recruits on industry best practices and exceptional client services.
- Frequently accompanied appointments with the new advisors to assist them in meeting with the clients,

gathering information and profiling the client.

Financial Advisor

Jun 2002 - Sep 2009

Prospected, developed and maintained new clientele while upholding relationships with existing clients, keeping their plans up-to-date. Represented Merrill Lynch, a national investment bank; offered a wholistic and non-transactional style approach to wealth management.

- Interacted with potential clients, made recommendations for financial plans based on their investment risk and long-term goals.
- Exceeded sales goals by effectively selling financial products and services.
- Recommended strategies to clients to help them achieve their financial goals and objectives, including specific recommendations in such areas as cash management, insurance coverage, and investment planning.
- Monitored financial market trends to ensure that plans are up to date, and to identify any necessary updates.

PRIOR EXPERIENCE

Focus Financial Network | Minneapolis, MN

Financial Advisor

Lutheran Brotherhood (Thrivent Financial) | Minneapolis, MN

Financial Advisor | Resource Center Partner | Systems Administrator

EDUCATION

Masters of Accounting - University of Phoenix - Phoenix, AZ

BS Education - University of Nebraska - Lincoln, Nebraska

Completed Degree Coursework - Gustavus Adolphus College - St. Peter, MN

Commissioned Officer - Naval Reserve Officer Training Corp - Lincoln, Nebraska

PROFESSIONAL AFFILIATIONS

President, Board of Directors - Good Earth Village, Spring Valley, MN

Board of Directors - Boys and Girls Club of Rochester - Rochester, MN

Parents Council, Student Mentor - Gustavus Adolphus College - St. Peter, MN

Treasurer, Endowment Committee - Bethel Lutheran Church

Properties Committee, Youth and Family Volunteer - Normandale Lutheran Church, Edina, MN

HONORS & AWARDS

Smart-HR - Best Places to Work Award - 2017

Certified Holacracy® Facilitator - 2016

Graduate - Leadership Greater Rochester - 2007