

**Areas of Expertise**

- Account Reconciliations per GAAP
- Month & Year End Close, JEs
- Financial Statement Prep & Reporting
- FP&A (KPIs, large data); dashboards
- Budgeting & Forecasting
- Audit Preparation & audits incl gov't
- WIP, % Completion, Std Job, Cost Acctg
- Internal Controls incl. SOX
- Software Implementation/Conversion
- International (multiple countries)
- Staff Supervision
- A/R, A/P, numerous GL accounts
- Fixed Assets, capital mgmt, ROI models
- Accuracy, attention to detail; deadlines
- Inventory mgmt
- Regulatory reporting
- Cashflow planning & mgmt; treasury
- Acquisitions, Mergers
- Sales & Use Taxes
- Payroll, Benefits, and Taxes
- Multi-division; Interco & consolidations
- Project management
- Working with Exec Mgmt and Boards
- Strategic & Tactical planning

**Industry Experience**

- Manufacturing
- Retail
- Technology (Hard/software, SaaS)
- Professional Svcs (numerous)
- Franchising
- Non-profit / government / Associations
- Distribution
- Consumer products/package goods
- Advertising
- Telecommunications

**Computer Applications / ERP**

SAP  
 JD Edwards  
 Epicor  
 MS Dynamics  
 QuickBooks  
 SAGE  
 Numerous industry specific ERPs  
 CoStar  
 ADP (& other outsourced providers)  
 Avalara (sales tax app)  
 Numerous POS systems  
 Excel (pivots, vlook-ups); MS Office

**Education/Qualifications**

- Bachelor of Science in Accounting with honors, University of Minnesota
- Minors: Mathematics, Mgmt Info Systems
- CPA (inactive), PWC

**Professional Experience**

With 15 years of proactive strategic and tactical Accounting and Finance experience, I have held Controller, Accounting Manager and Director of Finance roles for companies ranging from Start-ups to Fortune 500 firms across numerous industries. My experience includes hands-on and supervisory roles across all financial operating functions. Additional passions and history of results include identifying actionable insights to drive sustainable growth, collaborating with business functional leaders to drive change and process improvement, developing high performing teams, leveraging technology, and overcoming challenges. Extensive Excel skills.

**Robert Half, (acctg svcs) Senior Consultant, 2022 - 2024 ... sample major clients****Viad/Pursuit Collections (hotel, restaurant, excursions, transportation) \$100m, 6 months as A/R Director**

- Re-designed daily A/R billing process. Result: Brought past due billings to 99% current from 5 months past due.
- Re-designed A/R reporting package. Result: incorporated extensive KPI metrics, and detailed customer and variance analysis.
- Supervised staff of 11 across U.S. and International using 6 POS systems

**Advanced Assembly (technology mfg) ... \$50m, 16 months as Controller (Corp and Plant)**

- Produced financial reports; redesigned all accounts' reconciliations and prepared numerous accounts' recs monthly, converted books to GAAP, established financial/SOX controls & processes.
- Re-designed monthly close. Result: Improved from 20+ days to closing in 3 days.
- Re-designed monthly financial statement package. Result: incorporated extensive financial analysis, KPI metrics, and unique detailed variance analysis using multi-system data warehouse extracts. Drove 47% bottom-line growth.
- Role: Staff supervision (a/r, a/p, 2 accountants, tax, acctg mgr), multi-function management presentations & operations coordination, monthly presentations to holding company executive management.

**Karsh Hagan (marketing agency) Controller (2021 – 2022)**

- Produced monthly financials on-time for first time in over 10 years. Result: Numerous changes in owner financial business mgmt. Operating cost cuts over \$300k annually.
- Created new financial analysis reports for clients' profitability. Result: Determined over 50% of clients not profitable; \$250,000 fee obtained immediately from one client. New year negotiations resulted in over \$1MM in increased fees.
- Reconciled all general ledger accounts (none done correctly for years). Result: One error resulted in increased GI & operating profit of over \$2M from errors going back to 2008.

**RGP (acctg svcs) Senior Consultant (2018 – 2021) ... sample major clients****Ball Corporation (manufacturer, Fortune 500) ... 11 months, payroll project mgmt**

- Resolved payroll accounts not reconciling for over 18 months old from initial outsourcing to ADP; Ball terminated all payroll staff resulting in a lack of expertise to manage reconciliations, tax payments, etc., after the ADP conversion.
- Result: located over \$10M in payroll account reconciliation differences.
- Result: found \$30M in duplicate cash payroll paid not found by treasury or internal audit teams.

**Century Link (telecom, Fortune 500, International) ... 8 months international project mgmt**

- Transition from Excel documentation to CoStar software 4,000+ EMEA leases for compliance with ASC 842 working with EMEAs' operating lease admin managers and accounting teams, technical accounting, and project management, and CoStar's software implementation.
- Reviewed EMEA lease administrators' data updates across 50 fields for 4,000 leases and provided hundreds of corrections to meet ASC 842 compliance.
- Reviewed G/L reconciliations provided by EMEA accounting of all payments to master data schedules and resulting variance analysis. Frequently, generated correcting entries or extensive further documentation of variance to pass senior management review audit.
- Added to the LATAM and APAC teams to catch up and further correct errors.

**Agfinity (agriculture, retail, energy coop) | \$300m, Controller (2017 – 2018)**

- Directed accounting, finance, HR, payroll, customer service and IT support functions provided to operating divisions
- Reduced all non-operational departments' operating costs (ranging from 18 to 70+%).
- Improved GAAP compliance and established proper account reconciliations.
- Reviewed all retail locations sales tax policies by customer segment; corrected, obtained refunds, obtained mitigated penalties, developed new controls.

**Baker Tilly (acctg svcs) Senior Consultant (2012 – 2016) ... sample major clients****Five Star Professional Services, Controller 9 months**

- Reconciled accounts; produced financials; trained staff; developed control processes.
- Collected over 90% of all receivables from 90 to 270+ days past due within 75 days.
- Built process and electronic system integrating sales team forecasting and new CRM system.

- Supervised accounting staff of 7; prepared monthly financials, reconciled GL

**Nano Stone (manufacturing, international, PE backed) ... 7 months project mgmt**

- Re-constructed 3 years acquisition records.
- Corrected complex initial acquisition journal entry per GAAP.
- Compiled and corrected year-end financials for 3 years.

**Chandler Industries (mfg, PE backed, \$200m) ... 17 months as Controller (Corp and Plant)**

- Cost accounting: Corrected significant errors in system (WIP, absorption, BOM, purchasing, inventory counts, forecast/budgets, GAAP) for 5 plants incl Mexico.
- Developed cash flow management system and bank debt compliance reporting.
- Revamped physical inventory process for five plants including in Mexico.
- Developed new budgeting process and tool.
- Supervised accounting staff: A/R, A/P, and 2 staff accountants
- Managed annual and customers' incl DoD audits obtaining clean opinions.

**Target (retail) & Cognizant (SaaS, svcs), joint venture, Fortune 500 ... 14 months as Finance Manager**

- Establish new system & provide in-depth financial analysis, reporting, processes, and controls for this new joint venture. Train project mgrs & mgmt on new system & tools.
- Reporting, and senior management presentations for both companies.
- Result: Sole financial individual supporting team of 300 and 100s of software projects.

**Cincom,(software) | Director Operations, Internet Division (2009 – 2011)**

- Directed development of new software application for new division
- Built services capability for 5 other software divisions in company
- Landed 7-figure sales contract across global client ... company's first ever service sale

**Rapid Refill (retail, services, manufacturing, PE backed) | Controller (2002 – 2009)**

- Responsible for all A/R, A/P, financial rptg, regulated industry compliance, audit, product costing, inventory, payroll/benefits/HR, budgeting/forecasting, and financial analysis for the company and 70+ franchisees operating 100+ facilities.
- Developed financial and operational system with dashboards, custom recommendations, and 1:1 coaching for all owner-customers. Solution provided financial, production, pricing, inventory, sales, and expense input vs. best results and practices.
- Redesigned cost accounting methodology addressing widely fluctuating raw materials costs, scrap waste and defectives, labor productivity, and burden across 100 locations.
- \$300,000 tax savings identified missed by external tax specialists.

**More Companies (holding: real estate, warehousing, marketing, professional svcs, 4 others.) | Controller, VP Operations (1999 – 2002) \$120m**

- Improved gross margin from 32% to 67% in two years
- Number 1 salesperson for 6 years, landing over 7 figures in sales each year including landing clients Apple, Toshiba, P&G, Pillsbury, and other Fortune 500
- Direct reports of 12 and indirect exceeding 150 across all companies including sales, marketing, customer service, purchasing, call center, production, support, IT, HR, admin.
- Client accounts directly managed: Pillsbury, P&G, Toshiba, Dean Foods, Wisconsin Tissue, Disney, and others

**Price Waterhouse Cooper | Auditor, Senior Auditor (1996 – 1999)**

- Major clients: IBM, Medtronic, KTCA-TV, MN power company, insurance company, mfg firms, among others