

Finance Fxxxxxx, CPA

CHIEF FINANCIAL OFFICER • CONTROLLER

Address
City, ST Zip
Phone
Email
LinkedIn

PROVIDING BEST-IN-CLASS FINANCIAL MANAGEMENT ACROSS MULTIPLE BUSINESS ENVIRONMENTS

An innovative senior leader with a 20-year track record of improving profitability. Successfully merge strategic, operational, and tactical financial expertise with demonstrated capabilities in business development, capital acquisition, financial planning and analysis, and P&L management. Build high-performance teams by aligning the finance function with core business segments. Drive for tangible accomplishments is counterbalanced by an equal drive for correctness. Keen to challenge the status quo when necessary.

CORE COMPETENCIES

- Strategic and Tactical Business Planning
- Financial Analysis and Modeling
- Business Process Design
- Management Reporting
- Cost Containment & Profit Management
- Building & Maintaining Relationships
- Developing Highly Productive Teams
- Information Technology
- Public Speaking and Presentations
- **Value added:** 4 years of auditing experience.
- **Value added:** 8 years of IT experience allowing highly successful financial software implementation.

“Brian raises the bar when it comes to the caliber of work accomplished and managing people. His exceptional leadership, work ethic, and professional competence allow him to succeed in any task laid before him.”

– Sxxxxx Xxxxxx, VP of Aaaaaaaa Cccccc

SELECT PERFORMANCE HIGHLIGHTS

- Helped a capital-poor environmental services firm go public and develop and execute domestic and international growth strategies. The company is now actively traded with \$41M market capitalization.
- Led a critical IT, finance, and accounting systems integration for a \$30B privately held company. The initiative saved \$1M+ per year, improved reporting and decision support systems, and facilitated the launch of new product lines.
- Helped a start-up obtain \$4.75M in private equity funding, secure multiple contracts totaling \$17M, and realize domestic and international growth.
- Played a key role in boosting revenues three-fold for a homebuilding and land development company. Turned around profitability in three years—net loss of \$100K to net profit of \$8.5M. Secured \$125M in new funding by establishing collaborative financial institution relationships.

CAREER CHRONOLOGY

Interim CFO/Controller , P P P P P B B B B B—Dallas, Texas	2015 – Present
CFO , C C C C C C C C C C C C C C, INC.—Austin, Texas	2013 – 2015
COO , A A A A A A A C C C C C C C, INC.—San Antonio, Texas	2012 – 2013
Interim CFO , I I I I I I I I I I C C C C C C C C—Dallas, Texas	2012
Executive VP & CFO , T T T H H H H H H H H H H GROUP—Austin, Texas	2007 – 2011
Principal , I N N N N N N S S S S S S—Amarillo, Texas	2004 – 2006
Senior Financial Analyst , G G G G G T T T T T T T SERVICES—Amarillo, Texas	2002 – 2004
Senior Auditor , Y Y Y Y Y Y C C C C C C—Amarillo, Texas	2000 – 2002
Staff Auditor , Y Y Y Y Y Y C C C C C C—Amarillo, Texas	1998 – 1999

EDUCATION

Bachelor of Science
Finance and Accounting (double major)
University of Texas

“(Fxxxxxx) was a trusted senior executive who provided thoughtful analysis and leadership in many areas of the company. His peers respected him and valued his positive attitude, honesty and integrity, which proved to be invaluable when difficult decisions were required.”

– M m m m m R r r r r r, CEO of X x x x x x x x x x

Finance Fxxxxxx, CPA – CRITICAL LEADERSHIP INITIATIVES

~ AS INTERIM CFO/ CONTROLLER: INDEPENDENT CONSULTING SUCCESSES ~

OVERVIEW: Project #1

A capital-poor environmental services firm and its investors wanted to go public and execute domestic and international expansion plans.

Challenge To establish financial and accounting systems in support of their vision.

- Actions**
- ☑ Cleaned up 3 years of accounting records. Created a 5-year financial pro forma.
 - ☑ Established finance and accounting systems and reporting capabilities.
 - ☑ Redefined business processes and decision support systems.
 - ☑ Established asset safeguards and information controls.
 - ☑ Secured external auditor's opinion on financials.

Impact **Secured initial \$3M investment.** Company now actively traded with **\$41M market capitalization.**

OVERVIEW: Project #2

A \$30B privately held metals processing company was not realizing the benefits of a \$70M manufacturing and distribution acquisition due to lack of IT systems integration.

Challenges To assume all finance, accounting, budgeting, forecasting, and management reporting duties with no interruptions in related deliverables. To lead and manage the accounting team and assume the duties of the existing CFO who was promoted to president.

- Actions**
- ☑ Built rapport with the existing controller, created a team atmosphere, and won the respect of all senior executives and subordinates.
 - ☑ Created a strategic game plan and earned the CFO's buy-in.
 - ☑ Improved processes and procedures.
 - ☑ Partnered with Global Governance Solutions in a critical external audit.
 - ☑ Provided timely and reliable management reporting to senior executives at both the subsidiary and parent companies.
 - ☑ Restructured and recreated a budgeting model to improve processes, allow for easy modification, provide superior reporting analytics, and integrate with the existing software system.

Impact **Successfully migrated the financial and accounting systems** to the parent company, which resulted in the desired business transformation. **Saved the parent company \$1M+ per year, improved reporting and decision support systems, and facilitated the launch of new product lines.**

~ AS CFO OF CCCCCC CCCCCC: A START-UP VICTORY ~

OVERVIEW

The company had no in-house financial expertise – it had all been outsourced. Still, it had managed to land a large contract in Mexico and similar deals were in the works in both the U.S. and Mexico. It also managed to secure \$10M+ from a private investor. There were no IT systems to handle many aspects of the business, including inventory, accounts receivable and payable, accounting, purchasing, sales orders, and customer relationship management (CRM).

Challenge #1 To secure growth capital and implement new accounting, finance, financial modeling, IT, and business process systems to allow the company to expand domestically and internationally.

- Actions**
- ☑ Created a 5-year pro forma to paint the picture of long-term revenues, costs, and profitability.
 - ☑ Brought accounting in-house and established internal controls. Designed new JV deal models.
 - ☑ Hired, trained, and managed finance and accounting staff in the U.S. and Mexico.
 - ☑ Selected ABCD as independent auditors to develop domestic and international tax strategies.
 - ☑ Researched, selected, and collaborated with an investment banking firm to market CCCCCC CCCCCC in search of capital. Identified the investor target market; conceptualized, created, and refined the investor presentation; and wrote and finalized the "deal book."

Impact **Company received \$4.75M in private equity funding** and landed **3 new contracts worth \$17M** in cash flow using new financial models. New finance and accounting infrastructure enhanced the ability to understand revenues, costs, profitability, and joint venture options.

Finance Fxxxxxx, CPA – CRITICAL LEADERSHIP INITIATIVES

AS CFO OF CCCCCC CCCCCC (CONTINUED)

- Challenge #2** To build an IT platform and systems that allowed the company to operate domestically and internationally with limited resources, time, and money.
- Actions**
- ☑ Identified and documented critical IT requirements.
 - ☑ Researched and selected an online ERP/CRM system capable of multinational operations.
 - ☑ Negotiated favorable pricing for system implementation, support, and ongoing service.
 - ☑ Hired, developed, and managed the project implementation team.
 - ☑ Directed the migration of existing records to the new system.
 - ☑ Conceptualized and designed the system operation training program.
- Impact** New ERP/CRM system was successfully implemented in the U.S. and Mexico. **Saved approximately \$50K in implementation expenses** versus a more standard approach. **Saved an estimated \$85K in annual operating costs.** Significantly improved the company's ability to handle all aspects of operating a multinational business.

~ AS EVP & CFO OF TTT HHHHHHH GROUP: BUILDING A COMPANY ~

OVERVIEW

This young homebuilding and land development company was experiencing significant growth and had been through three CFOs. There were no business processes in place and accounting records were in disarray.

- Challenge** To assume the role of CFO and build the finance, accounting, and IT functions while managing fast-paced growth. This included developing and implementing policies, procedures, internal controls, and management reporting systems.
- Actions**
- ☑ Implemented a workflow automation and management reporting system.
 - ☑ Created pro formas and a variety of financial models for budgeting, cash management, profitability analysis, deal structure analysis, and operational metric analysis.
 - ☑ Spearheaded efforts to develop automated budgeting, forecasting, and performance tracking systems.
 - ☑ Redefined the organizational structure, clearly defined product line goals and business segment objectives, and explicitly linked budgets to business objectives.
- Impact** Significantly improved operations and productivity. **Reduced overpayments, change orders, and cost overruns.** Enhanced decision-making support systems.
- Hhhhhh's **revenues more than tripled** from \$11M to \$45.5M within three years. Also **increased net profit from a loss of \$100K to a net profit of \$8.5M.**

~ AS COO OF AAAAAA CCCCCC: AVOIDING A PARTNERSHIP MISTAKE ~

OVERVIEW

This well-established commercial construction company decided to pursue a new growth and profitability strategy: to construct the buildings and acquire and develop the land beneath them. Having acquired two parcels of land, the company quickly learned that land development requires unique expertise. I was hired to bring that know-how to Aaaaaa.

In addition, the company was in discussions with multiple investors to acquire a commercial property to convert to condominiums and retail space.

- Challenges** To create a strategy to enhance the company's ability to analyze commercial building economics. To make appropriate financial and JV decisions.
- Action**
- ☑ Defined JV requirements, issues, and objectives. Established critical operating and financial criteria.
 - ☑ Analyzed potential financial and operating software – selected Argus and negotiated terms with the vendor. Implemented the software and developed a technology training plan.
- Impact** **An informed decision was made not to move forward with the JV** based on the enhanced understanding of commercial building economics.