



Currently Available Consultants

Following is a partial list of Finance and Accounting consultants ready to step in and help today.

[Chief Financial Officer / Controller Consultants](#)

[External Reporting / Audit and General Consulting](#)

[Accounting Consultants](#)

[Finance Consultants](#)

[Tax / Internal Audit / Treasury / Business Systems](#)

[Accounting Operations Support](#)

Chief Financial Officer / Controller Consultants

CFO/Controller, CPA

#10205

- CFO/Controller who successfully managed a team of five professionals, overseeing comprehensive tasks related to cash management, account reconciliations, accounts receivable and payable, and payroll functions
- Led and facilitated audit requests, ensuring seamless external reporting and compliance with regulatory standards, showcasing a track record of accuracy and timeliness
- Developed and implemented robust desk procedures and internal controls, resulting in increased efficiency and accuracy within the accounting processes
- Orchestrated subsidiary accounting and spearheaded month-end close entries, enhancing accuracy in revenue by program, cost of goods sold, accruals, and cash settlements
- Contributed significantly to income statement review analysis, providing critical insights for strategic decision-making and financial planning

CFO

#93901

- CFO/Controller with extensive experience in technical accounting, hands-on management, and strategic oversight
- Seasoned Certified Public Accountant (inactive) from a prestigious Big 4 firm, boasting over two decades of professional experience spanning the entire business lifecycle from start-up through IPO
- Demonstrated proficiency in navigating complex transactions and integrations, with a track record of success in driving financial and operational synergies
- Known for fostering collaborative relationships across functions, fostering high levels of trust and communication to streamline processes and drive continuous improvement initiatives
- Partnered closely with CEO to integrate a subsidiary, orchestrating an aggressive two-month turnaround plan that resulted in notable reductions in SG&A expenses, including a 30% reduction in wages and a 25% decrease in lease costs

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VP Finance & Accounting, MBA

#67571

- An accomplished finance and supply chain management professional with expertise in ERP implementations and upgrades
- Demonstrating a proven ability to drive real cost savings and streamline workflows, this professional has a strategic vision and operational execution that has resulted in notable accomplishments in private equity due diligence, debt financing restructuring, cash management, and team leadership across diverse global geographies
- Raised \$2 million through private equity due diligence and financial management, resulting in significant growth for the restaurant chain
- Restructured debt financing through legal filings and due diligence, leading to a more sustainable financial structure for the company
- Focused on cash management and made the company cash-neutral before leaving, improving financial stability, and setting the company on a path to success

CFO, CPA, MBA

#95172

- Structured debt financing with banks, equity financing with investors, and partnerships with distribution partners
- Integrated NetSuite with Salesforce, Treasury ad-on module, into the ERP system
- Managed controls across all divisions, automated processes, and handled over 120 sales contracts in Salesforce
- Conducted annual certified audits
- Managed \$90 million in credit facilities and project financing

CFO, MBA

#65334

- CFO experienced in partnering with private equity firms managing portfolios of small businesses and companies receiving PE firm offers
- Conducted post-acquisition activities including Balance Sheet reconciliations, budget development, reporting package creation, and growth strategy recommendations
- Assisted a media company, in securing funding for content creation and middle management hiring
- Implemented SAGE Intacct software
- Managed a revenue recognition project for an advertising agency

CFO, MBA

#92907

- CFO, who led the successful close and funding of a \$15 million initial capital raise from private equity, launching the company and managing all aspects of corporate finance, accounting, and Treasury functions
- Built financial models and projections, managed financial reporting, including monthly and quarterly unaudited financial statements for investors and the Board of Directors, and ensured strict adherence to GAAP and compliance with ASC 606, ASC 920, and ASC 926
- Oversaw all company operations, including corporate legal, business affairs legal, human resources, content development, and production of television, feature films, and podcasts, while managing internal reviews and reporting of key performance metrics (KPIs)
- Played a key role in developing and executing the overall company strategy, including short and long-term business planning, creating annual operating plans, multi-year strategic forecasts, and providing performance measurement and commentary
- Successfully launched and expanded the company's operations, including talent management and a podcast, driving growth from pre-revenue to over \$5 million in Annual Recurring Revenue (ARR) and optimizing ad inventory and brand sponsorships across the podcast network

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CFO, CPA, MBA

#96443

- Built the finance department and established processes to support high growth and planned drug commercialization
- Developed comprehensive planning processes, including long-range planning, budgeting, cash forecasting, and scenario planning to extend cash runway
- Led finance functions for system implementations, including SAP, Ariba, Workday, transfer pricing tax structures, and SOX compliance
- Managed regulatory filings such as 8K, 10Q, 10K, S-1, and Proxy statements, along with presentations for management, audit committees, and board meetings
- Oversaw strategic debt financing for a \$100M manufacturing site and led downsizing efforts to align with financial and strategic goals

CFO

#47393

- Began career in audit, focusing on aerospace and defense clients, then transferred to a new region to work with various industries
- Led the implementation of new revenue recognition standards as a first-year manager
- Built out accounting processes and implemented an ERP system at a boutique apparel company
- Managed audits, financial reporting, and ERP systems in the entertainment and event industries
- Extensive experience with SEC reporting, process improvements, and event settlement management

CFO

#97823

- Seasoned executive with 20+ years in real estate investment management, financial oversight, and strategy
- Specializes in restructuring financials, cost allocations, and identifying key profit drivers
- Develops 1- to 5-year financial plans and collaborates with marketing and sales teams
- Experienced in sourcing M&A opportunities and optimizing portfolio performance
- Available for fractional CFO engagements, providing 20 hours per week of strategic financial leadership

CFO, MBA

#13215

- Led finance, treasury, accounting, HR, and IT teams to turn around a \$50MM CPG food manufacturing company post-Chapter 11
- Achieved a \$4MM net income increase (8%) in the first year while increasing branding spend
- Refinanced a \$32MM credit facility, improving financial flexibility and cash flow
- Restructured manufacturing operations, reducing headcount by 20+ FTEs and increasing productivity, adding \$2MM to net income
- Created inventory forecasting and reporting systems, realizing \$1MM in annual savings and supporting an 11x EBITDA sale

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CFO, MBA

#2557

- Developed and implemented strategic plans aligned with long-term financial objectives, budgets, KPIs, and corporate goals
- Executed aggressive strategies to increase volume, profit margins, and financial control while maintaining lean inventories
- Established and enforced business policies, SOPs, and internal controls in accordance with US GAAP and IFRS standards
- Directed Treasury, Tax, Audit, Legal, Compliance, and Risk Management, passing annual audits with top firms
- Led ERP and EDI system implementations, enhancing operational efficiency and improving cash flow performance

External Reporting / Audit and General Consulting

IT Audit Sr. Manager, CPA/CISA/PMP

#42340

- Recently completed 2 projects for us for a large healthcare organization in which he was responsible for a large confidential payroll data project
- Successfully completed SOCI reports for two SaaS companies, demonstrating a strong understanding of data security and compliance
- Diligent project management to ensure precise data extraction and compilation
- Comprehensive data update for approximately 700 employees. Expertly present findings in a detailed and professional manner, aligning with the standards of a BIG 4 internal auditor
- Proficient in Microsoft Azure Cloud Services, certified in Microsoft Azure

Sr. External Auditor, CPA

#79561

- Experienced auditor with a background in mid-tier public accounting firms
- Extensive work history with clients of varying sizes, encompassing small to mid-cap companies
- Diverse industry exposure, including construction, real estate, and manufacturing sectors
- Successful reconciliation of 2 years' worth of previously un-reconciled bank accounts
- Methodical and thorough reconciliation of all accounts within the General Ledger (cleanup project)

Accounting Consultants

Staff Accountant, MBA

#90284

- Accountant with demonstrated expertise in month-end close, reconciliations (account and bank), journal entries, accruals, prepaids, and account analysis
- Developed invoice templates, and ensuring timely and accurate billing
- Conducted reconciliations of accounts payable, credit card, and bank records, ensuring accuracy and compliance with accounting standards
- Created a production form to verify daily activities of doctors, enabling proper accounts receivable aging and revenue recognition at the point of service rendered
- Established an accounts receivable process for clients issuing grants and public funds, ensuring all financial transactions were conducted in compliance with regulations

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Controller

#68301

- Accomplished Controller with extensive experience in mergers and acquisitions and a passion for helping companies become more streamlined
- Demonstrated success working with large companies across diverse industries, including publicly traded and privately held entities, and government organizations
- Specializes in complex multinational businesses, with a deep understanding of GAAP, IFRS, SOX, and local GAAP/tax requirements in various countries
- Led finance and accounting teams in biopharmaceutical and aerospace businesses, streamlining processes and implementing internal controls to drive efficiency and accuracy
- Successfully delivered financial reports for multiple regions, including those behind schedule and for organizations subject to SOX and JSOX regulations
- Expert in cost accounting, implementing cost variances, routings, standard costing, and ABC costing to achieve cost savings and better decision-making
- Fluent in multiple languages and a proven leader with a track record of building and motivating high-performance teams

Staff Accountant

#94516

- Staff Accountant overseeing accounting functions for multiple homeowner associations, ensuring accuracy and adherence to deadlines
- Manages both accounts receivable and accounts payable processes, consistently achieving high levels of precision in vendor payment processing
- Conducts thorough monthly bank reconciliations in a timely manner
- Generates and distributes monthly statements for homeowner associations
- Processes a substantial volume of accounts payable transactions, averaging between 100 to 200 weekly

Sr. Accountant, MAFM

#94675

- Set up inventory management system with bin tracking for Inbound/Outbound orders
- Prepared financial management reports and reconciled all accounts post close with review of P&L
- Processed AP and AR payments and verified invoice accuracy
- Ensured accurate recording of expenses, reimbursements, and timesheets in payroll processing
- Reconciled various general ledger accounts during month-end close

Controller, CPA

#81449

- Experienced Controller with experience working for publicly-traded companies across industries, including health care (provider and payer), waste management, transportation, digital advertising, consumer goods, garment/textile, engineering, and natural gas
- Started career in publicly accounting, and later transitioned to private industry working for companies ranging in size from \$500M- \$2B+ in revenue)
- Expertise in system implementation, process and system integration, financial reporting, and external audit
- Skilled in managing shared services, treasury functions, internal control and policy development, and AR & AP processes
- Proven ability to drive process improvements, manage debt covenants, oversee month-end close, and handle tax-related activities
- Reviewed vendors and managed the P2P process

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Assistant Controller, MBA, CCIFP

#40763

- Expertise in real estate development and property management, services, manufacturing, HOA, and construction industries
- Managed financial reporting, budgeting, and compliance for private companies, including producing financials for 40 commercial entities and overseeing distribution of \$100M gross revenue
- Conducted financial reviews and 401k audits
- Knowledgeable in both cash-based and accrual-based accounting
- Utilized SAGE 100 Contractor for construction accounting, and managed fixed assets, depreciation, and CAM reconciliation

Sr. Revenue Accountant, MBA

#2222

- Revenue Accountant with extensive background in the environmental, high-tech, financial services, and manufacturing industries
- Proficient in collaborating with various organizational levels and cross-functional departments to ensure timely completion of month-end close processes
- Advanced technical accounting skills in ASC 606, including the preparation of monthly revenue recognition entries using the percentage-of-completion method, cost reallocations, and monitoring of new contracts in collaboration with project management teams and financial planning and analysis (FP&A)
- Skilled in preparing and posting month-end journal entries related to fixed assets, royalty accruals, and executing month-end closing activities, including Balance Sheet reconciliations, accounts payable, and accounts receivable
- Expertise in account reconciliation and monthly reconciliation of deferred revenue accounts

Internal Audit Manager, CPA

#95283

- Managed the full accounting life cycle from recording through management reporting
- Formalized company policies, procedures, and control documentation
- Provided technical accounting guidance on significant transactions, including financing arrangements and sale-leaseback transactions
- Transitioned from QuickBooks to NetSuite; established internal controls and the implementation of SOX compliance to prepare for a public offering
- Handled pre-revenue financial operations, including managing a 4,000 unit backlog of deposits and matching contracts to cash on hand

Controller, MBA

#1637

- Experienced Controller with expertise in logistics, transportation, and manufacturing
- Specializes in privately held companies with revenues ranging from \$6M to \$50M
- Core competencies: financial statement preparation, proforma financials, budgeting, 5-year projects, internal controls, cost accounting, cash flow analysis, bank relationships, fixed assets, process improvement & documentation, system implementations, and inventory control
- Major accomplishments include performing full Balance Sheet account reconciliation, ensuring accurate financial statements
- Assisted companies with audit readiness, validating Balance Sheet account balances, and providing supporting documentation to auditors

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Accounting Manager

#6917

- Accounting Manager with expertise in General Ledger (GL), month-end close, and Balance Sheet reconciliations
- 5-6 years of CAM (Common Area Maintenance) reconciliations
- Financial analysis and variance reporting
- Journal entries and accrual accounting
- Budgeting and forecasting, including cash flow management
- Real estate financial analysis and lease accounting

Sr. Accountant

#64804

- Accountant with 10 + years of combined experience operating in an accounting and bookkeeping capacity
- Highly skilled in preparing and analyzing financial statements
- Manages cashflow, including budgeting and forecasting
- Proficient at providing high quality service to internal and external clients
- Bookkeeping and accounting recording in various industries

Accounting Manager

#98756

- Led short- and long-term cash flow forecasting and trend analysis, supporting alignment with budget and strategic goals
- Revamped cash flow modeling by division and consolidated for comprehensive financial planning and visibility
- Supervised daily bank reconciliations and supported banking operations across multiple business units
- Directed team of 10 in AP, Fixed Assets, and GL, while improving close timelines and process efficiency
- Oversaw multiple finance system upgrades across payroll, POS, AP, and expense platforms, enhancing automation

Sr. Accounting Manager

#98757

- Prepared monthly journal entries for cash, payables, prepaid expenses, and department-level allocations
- Performed accurate bank and account reconciliations to maintain integrity of income, expense, and balance sheet records
- Supported audits through documentation consolidation, walkthrough participation, and coordination with external firms
- Executed special accounting projects, ad hoc analyses, and financial reporting for management review
- Utilized accounting software including Excel, QuickBooks, and Xero to analyze data and resolve discrepancies

Sr. Accountant

#98755

- Created a 20-page SOP manual by assessing workflows, identifying gaps, and documenting procedures using templates and spreadsheets
- Cleaned up historical entries from 2020 to ensure audit compliance and maintain eligibility for grants
- Performed full-cycle accounting in QuickBooks Online, including AP, AR, inventory tracking, and adjusting journal entries
- Led a team of 3 accountants to establish month-end close procedures, prepare audits, and improve reconciliation accuracy
- Streamlined AP/AR processes, mentored staff, clarified workflows, and resolved knowledge gaps across the department

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Assistant Controller

#82706

- Assistant Controller and Senior Accountant with extensive manufacturing experience and a history of being retained by clients for exceptional accounting expertise
- Core competencies include account and bank reconciliation, financial reporting, tax preparation, financial analysis, General Ledger reconciliation, month-end closing, inventory management, consolidation, payroll, 401K administration, journal entries, Balance Sheet reconciliation, system conversion, Accounts Payable, Accounts Receivable, and audit preparation
- Licensed Tax Preparer with experience managing financial reporting for multiple entities
- Key achievements include creating a new Chart of Accounts, producing consolidated financial statements, and converting foreign currencies
- Taught accounting courses at local colleges and proficient in SAP, Hyperion, Fishbowl, and QuickBooks

Sr. Accountant, MBA

#46106

- Experienced Senior Accountant in manufacturing environments
- Skilled in month-end close, financial reporting, and variance analysis
- Proficient with ERP systems including SAP and Oracle
- Strong background in budgeting, forecasting, and cost accounting
- Known for accuracy, reliability, and cross-functional collaboration

Controller, CPA

#101429

- Cut close timeline in half and eliminated 98% of manual cash entries through automation
- Built scalable accounting operations supporting growth from \$0 to \$200M+ in revenue
- Implemented ERP system for AR and revenue; filed 30+ monthly sales tax returns
- Maintained audit-ready controls with zero adjustments over 4 years
- Saved \$50K annually by optimizing payment processing fees and vendor selection

Controller, CPA, MBA

#21695

- Directed \$1B operations across 18 countries, ensuring SEC and statutory compliance
- Led Oracle R12 ERP rollout, cutting close time by 20% and streamlining core processes
- Maintained zero material weaknesses through strong SOX controls and audit collaboration
- Supported global expansion by building financial infrastructure for new markets
- Guided adoption of ASC 606/842 and aligned regional reporting with investor messaging

Controller, CPA, MBA

#19571

- Managed global consolidations across US, Europe, Mexico, and Asia using Baan
- Streamlined reporting processes and partnered with IT to improve data accuracy
- Led weekly cash forecasting and tracked key operational metrics
- Transitioned AR/AP to paperless shared services; supported audit completion
- Improved reporting on warranty, T&E, and gross margin for private equity owners

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Controller

#90807

- Delivered financial consulting and project-based CFO/Controller services across industries
- Led ERP implementations and accounting system setups, including Baan and QuickBooks
- Reversed losses and improved KPIs through cost controls and strategic analysis
- Managed startups and SMBs, overseeing cost accounting, budgeting, and payroll
- Reduced tax liabilities and trained cross-functional teams to boost efficiency

Chartered Financial Analyst, MSF

#17857

- Drove cultural shift with operational reporting to support better decision-making
- Improved profitability by 2.5% and reduced inventory by 27 days to boost cash flow
- Cut DSO by 33%, increasing cash by \$1.2M through stronger collections
- Restructured team for efficiency and 20% cost savings
- Streamlined banking for higher interest income and simplified reconciliations

Finance Consultants

Sr. Financial Analyst

#89211

- Displayed advanced proficiency in intricate financial modeling and forecasting, providing precise projections to drive strategic decision-making
- Generated comprehensive dashboard reports and conducted thorough variance analyses, offering valuable insights for informed adjustments
- Took the lead in coordinating annual salary budget planning, crafting scenario models to optimize resource distribution with precision
- Demonstrated adeptness in corporate development, creating nuanced financial models tailored for meticulous M&A evaluations
- Spearheaded the automation of journal entries, property valuation, and financial statements, streamlining business operations and enhancing analytical capabilities

Sr. Financial Analyst

#92617

- Accomplished senior financial analyst, excelling in detailed financial analysis and reporting, providing critical insights for strategic decision-making
- Successfully developed and managed budgets for new product launches, collaborating with the director of operations and floor operations manager. Presented scenarios that guided decision-making processes
- Expert in market expansion, adept at creating budgets by analyzing variable costs, calculating margins, and determining fixed costs and break-even points. Ensured feasibility before initiating production
- Implemented internal controls that ensured financial accuracy and compliance with industry regulations, achieving a robust financial framework
- Utilized strong data analysis and interpretation skills to extract meaningful insights from complex financial data, facilitating data-driven decision-making

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Sr. Financial Analyst, MSF

#74328

- Conduct daily valuation analysis and control functions, including mark-to-market and pricing analysis for a diverse array of derivative instruments such as equities, bonds, mortgages, credit default swaps, interest rate swaps, and FX options
- Investigate and analyze pricing/valuation discrepancies, promptly identifying and escalating material discrepancies to clients' valuation committees or equivalent authorities
- Provide valuable assistance to clients in evaluating and assessing pricing sources, ensuring transparency and accuracy in their decision-making processes
- Collaborate closely with trade operations and fund accounting colleagues to facilitate the timely delivery of fund Net Asset Values (NAVs)

Financial Director

#95814

- Corporate Finance leader overseeing planning, reporting, and analysis for a \$230M capital budget
- Develops and executes financial analytics to drive strategic business decisions for optimal financial value
- Collaborates with business leaders to implement strategies for revenue growth, margin enhancement, and expense reduction
- Fosters business literacy across all functional levels through coaching, disciplined forecasting processes, and periodic financial reviews
- Creates interactive budgets and financial models for various operational departments to improve profitability and assess the cost of services provided

Sr. Financial Analyst, MBA

#96140

- Collaborated effectively with Sales, Operations, Marketing, Logistics, and Product teams in the US and China to provide insightful reporting for leadership
- Conducted comprehensive sales analysis to accurately represent gross profit margins by customer, product, region, and business unit
- Created a streamlined sales commission report and implemented a new review process, reducing turnaround time from eight days to four days
- Developed a thirteen-week cash flow forecast in partnership with an outside consulting firm, presenting weekly updates to the VP of Finance, CEO, and Board of Directors
- Established models for accurately capturing royalties for 24 licensors

Sr. Manager of FP&A, MBA

#75052

- Managed cost basis for a \$100M portfolio including exclusive resort properties
- Provided strategic direction to the Executive Team, Sales, and Revenue Management to enhance market share, revenue performance, and property profitability
- Conducted labor management meetings, assisting management with scheduling guidelines to drive labor efficiency and reduce costs by 10% year-over-year
- Oversaw short-term and long-term forecasting and financial planning to ensure effective financial management
- Monitored and controlled all sales, purchases, salaries, and expenses at the resorts while ensuring compliance with contracts, leases, and internal policies

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Financial Analyst

#96559

- Developed financial models to evaluate land acquisition, homebuilding milestones, and payback periods
- Forecasted quarterly and yearly business plans, including a \$2B budget, and collaborated on five-year plans
- Conducted competitive market analyses, monitored divisional KPIs, and prepared ad hoc financial reports for leadership
- Led month-end close processes, performed SG&A accruals, and analyzed income statement variances
- Managed capitalized vs. expensed fixed assets, depreciation schedules, and reclassifications related to AP and purchasing

Finance Director, MBA

#9028

- Led FP&A functions, including managing a team of four and overseeing annual budgets, five-year plans, and financial forecasts
- Implemented FP&A systems organization-wide and reduced monthly close timelines by 33% post-acquisition
- Collaborated on IPO filings, developed investor reporting metrics, and supported strategic initiatives for senior management
- Achieved an 8% reduction in lab supply spending and maintained drug portfolio variances within 2% of the budget
- Administered operating plans and cash forecasts across functions, ensuring variances remained within 5% of projections

FP&A Manager

#97532

- FP&A Manager experienced in international consolidations for five years, working with licensing-based businesses that manufacture, distribute, and sell directly to consumers
- Proficient in SAP, Oracle, Planful, and Tableau. Familiar with PowerBI as Liberated was in the process of implementing it, but unfortunately the project was scrapped
- Skilled in Excel, including pivot tables, VLOOKUP, XLOOKUP, and linking across multiple sheets and hundreds of tabs, managing large datasets at row capacity limits
- Automated a monthly brick-and-mortar report for 150 stores, reducing reporting time from 40 hours to minutes using AI
- Limited experience in consolidated financial reporting due to disparate European and Asian divisions reported separately to corporate. He posted journal entries and provided consolidated & business unit P&L reports to the Treasury Manager. However, at a major media and entertainment company, he was the only FP&A person that supported the accounting team, doing account reconciliations, journal entries, accruals, etc.)

VP Finance, MBA

#4703

- Responsible for corporate consolidations
- Increased EBITDA by reducing trade spend and developing customer-specific P&Ls across all channels
- Revamped budgeting process to include more SKU, COGS, and trade spend details, improving financial visibility
- Developed monthly company-wide P&L snapshots for the executive team, detailing sales and profits by department
- Created the cash flow forecast (global organization) in excel

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VP Finance, MBA

#97612

- VP finance with both operational and corporate finance experience for companies with revenue ranging from \$65MM to \$15B+
- Led multi-million-dollar investment decisions in consumer-facing industries (for 15 years), including CPG, DTC, luxury retail, off-price retail, restaurants, and technology, with expertise in financial strategy, FP&A, profitability, revenue growth, and investor relations
- Experienced financial leader with a history of building high-performance finance teams, optimizing cost structures, and developing strategic plans that drive business growth, increase sales by 15%+ YoY, improve profitability, and enhance overall company value
- Managed credit analysis and financial risk assessment for a \$15B US franchise, cultivating lender relationships, reviewing credit agreements, and evaluating franchisee debt compliance

Senior Financial Analyst

#8449

- Accomplished Finance Leader adept in financial analysis, problem-solving, and communication
- Successfully created P&L reports for 3 diverse cost centers, conducting variance analysis and tracking KPIs
- Developed comprehensive budgets integrating P&L, KPIs, forecasts, and variance explanations, meeting all deadlines consistently
- Established a sophisticated dashboard encompassing 3 cost centers and the corporate budget, managing a \$100M revenue
- Expertly reconciled financial models using data from Hyperion, accounting, and sales, ensuring accuracy and reliability

Finance Director

#98754

- Coordinated with commercial teams to develop metrics, analytics, and KPIs supporting revenue and margin insights
- Utilized proprietary databases to forecast growth, yields, and revenue projections across agricultural operations
- Created reporting packages for private equity stakeholders, including budgeting and profitability analysis by product
- Performed extensive data analysis using Excel tools such as VBA, VLOOKUPS, indexing, and pivot tables
- Supported transition of operations to Europe following private equity acquisition, maintaining financial continuity

FP&A Manager

#98793

- Supported East Coast clients remotely, using GoSystems (PwC) and Onesource for trusts and partnership tax filings
- Provided federal income tax support for asset management firms and hedge funds, with prior experience in FP&A
- Developed financial forecasts to inform strategic planning and resource allocation across business units
- Conducted performance and variance analysis to identify financial trends, risks, and opportunities
- Delivered sales support through financial insights to align revenue strategies with organizational goals

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FP&A Manager, MBA

#101242

- Provided strategic leadership in problem solving, mentorship, organizational improvement, cultivating entrepreneurial culture, behavioral marketing and finance, and KPI tracking
- Managed financial functions including forecasting, budgeting, financial analysis, modeling, 3-statement reporting, P&L management, fiduciary oversight, risk management, capital planning, and economic reporting
- Controlled operating expenses, ensured regulatory compliance, managed revenue and profit performance, analyzed AR/AP, and directed OPEX and CAPEX for a large supplier portfolio with significant revenue and marketing budgets
- Implemented market-indexed pricing frameworks, improved gross profit margins by 3%, increased revenue by 5%, and optimized cash flow and vendor ROI through targeted pricing and fund allocation strategies
- Led cross-departmental financial review meetings to enhance transparency and collaboration; role concluded due to corporate restructuring and relocation of finance operations

Finance Director, MBA

#64965

- Over 12 years of controllership and financial operations management experience at multinational consumer goods companies with annual revenue exceeding \$20B
- More than 14 years managing close processes for organizations with workforces over 50,000 employees
- 18 years of expertise in FP&A and accounting, including financial planning, budgeting, and forecasting
- 7 years of cost management experience, overseeing 1,000 SKUs with \$800MM in cost of goods manufactured
- Led successful system implementations of multiple ERP and reporting platforms in multi-zone environments, while developing teams and promoting continuous improvement

VP Finance, MAFM, MBA

#42948

- Developed a two-year strategic plan to grow revenue by 50% and improve margins from -15% to 5%, and implemented systematic budgeting and forecasting processes covering customer, P&L, cash flow, and operations outlook
- Reduced fixed overhead by 43% (\$7M), partnered across teams to close 20 past due projects and recognize \$30M in revenue, and lowered weekly inventory by 35% through improved reporting and backlog analysis
- Drove financial audit efficiencies by identifying control gaps, reduced material COGS and improved inventory valuations by \$3M, and introduced value stream reporting and LEAN accounting for greater transparency
- Decreased working capital requirements by \$3.3M through enhanced inventory control and strengthened accounts receivable practices
- Increased revenue by 26% (\$6.4M) by streamlining invoicing, recovered \$1.4M via intercompany billing restructuring, normalized project margins, reduced excess freight and inventory costs by 36%, and identified a \$300K pricing discrepancy

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Tax / Internal Audit / Treasury / Business Systems

Treasury Manager, MBA

#5479

- Supported the VP Treasurer with capital structure planning and execution across global subsidiaries, including term loan structuring, debt covenant compliance, and capital markets transactions
- Managed debt covenant compliance on a \$2 billion term loan, including notices, debt payments, letters of credit, revolver activity, and negotiated terms
- Executed five interest rate swaps totaling \$1 billion to hedge floating term loan exposure and supported two term loan repricings of up to \$2 billion, including incremental borrowings of \$550 million
- Prepared and presented analyses and materials for senior leadership and quarterly lender calls, including a term loan with 100 lenders, and created models to address potential investor questions
- Led liquidity management analysis, developed key performance indicators, created an issuance calendar, and collaborated with FP&A on treasury-related budget and long-range planning assumptions

Tax Specialist

#96061

- Worked as a tax preparer with Big 4 CPA firm experience, processing partners' domestic tax returns
- Utilized Dynamics (CCH product) for tax preparation
- Completed 150 tax returns, contributing to a total of over 5,000
- Prepared returns for property taxes, personal income, and trusts
- Reviewed and completed prior tax returns for Ernst & Young private clients, ensuring timely submission to state revenue agencies and the IRS

Sr. Manager Tax, MS Tax, CPA

#96560

- Holds an active CPA license from the Texas State Board of Public Accountancy
- Provides expertise in domestic and international tax compliance and provisions, including ASC 740 audits
- Reviews corporate tax returns, workpapers, and calculations for multinational corporations across various industries
- Manages compliance projects, performs ad hoc tax work, and conducts subject matter expert reviews for foreign operations
- Trains staff to enhance technical skills in tax provisions, compliance, and statutory filings

Indirect Tax Director, CPA

#81566

- Reviewed corporate and partnership income and franchise tax returns across multiple jurisdictions
- Defined apportionment and allocation logic; calculated consolidated and separate taxable rates
- Reconciled revenue, intercompany eliminations, depreciation, and other key tax inputs
- Analyzed tax adjustments including Sec. 163(j), 162(m), GILTI, and intangibles amortization
- Conducted detailed tax research on state and federal corporate tax compliance issues

Tax Director, CPA

#95695

- Prepared and reviewed year-end tax provision under ASC 740, including deferred tax calculations
- Implemented CorpTax software to streamline tax provision reporting and compliance
- Ensured Sarbanes-Oxley (SOX) controls were followed for all tax provision activities
- Supported audit processes by compiling tax documentation and providing detailed responses
- Identified and implemented tax provision workflow improvements and automation solutions

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Accounting Operations Support

Payroll Lead

#90375

- Accomplished Payroll Specialist with over 10 years of experience
- Proficient in utilizing Microsoft Excel, including VLOOKUP, pivot tables, and various formulas, for preparing accurate reports and reconciliations related to gross to net calculations and tax deductions
- Meticulous in validating payroll files and reports through comprehensive reconciliation and review processes to ensure utmost accuracy
- Collaborated effectively with stakeholders to compile payroll data from diverse sources, such as garnishments, Kronos time and labor, PTO, taxes, insurance, 401(k), and other third-party payments
- Demonstrated expertise in utilizing ADP payroll software for esteemed Fortune 500 companies, showcasing proficiency in industry-standard tools and systems
- Expertise in Multi-State Payroll management, ensuring compliance and accuracy across different jurisdictions

AP Supervisor / Manager

#62811

- Experienced AP Specialist/Supervisor with a demonstrated ability to streamline processes and reduce costs through strong attention to detail, using NetSuite
- Managed procurement effectively, ensuring the timely approval and receipt of all purchases
- Implemented a paperless system to improve efficiency and served as a liaison during audits
- Successfully led a team of 6-12 staff and demonstrated cost savings by reducing the monthly phone bill
- Efficiently processed 19,000 vendor invoices and 2,000 weekly invoices using Deltek and Concur project-based software

Sr. Real Estate Accountant, EA

#85327

- Managed accounts payable, printed checks, entered MRI journal entries, and ensured timely submission of MRI trial balances
- Prepared and reviewed month-end and year-end closing processes, reconciled payroll, and prepared comprehensive financial statements for the US office, including profit and loss, balance sheet, cash flow, and inventories
- Led cash management, financial reporting, and assisted in audit preparation with outside CPAs, including working with PWC Japan and PWC Korea on audited financial statements
- Coordinated monthly meetings with global offices in Japan, Korea, China, and Hong Kong to review and discuss financial reporting, sales, and budget preparation
- Finalized balance sheet analysis, audit DCR, payroll, and ancillary expenses while managing month-end close processes, including posting journal entries, account reconciliations, and bank reconciliations

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Payroll Manager

#96203

- Compliance, process, and results driven with over 10 years of payroll and payroll tax experience, specializing in multi-state payroll processing for 2,000+ employees using ADP Workforce Now (WFN) and Workday
- Extensive HCM implementation experience with ADP and Workday, including data import, data validation, and parallel testing; proficient in backend implementations for tax filings and deposits
- Developed and led payroll processes, ensuring timely and accurate weekly, bi-weekly, and off-cycle payrolls, including adjustments, severances, bonuses, and terminations
- Skilled in data analytics, validation, and direct project management for process enhancements; proficient in SQL for data extraction and advanced Excel functions such as VLOOKUP, pivot tables, and concatenation
- Conducts research, configuration, and quality assurance for payroll tax reporting across 30+ state and municipal tax jurisdictions, including Schedule R for PEO filings, and regularly analyzes new tax requirements for compliance

Payroll Specialist

#96111

- Over 10 years of experience in payroll tax filing (940/941, W-2s, 1099s) and high-volume payroll processing for 4,800–20,000 employees across varied pay frequencies
- Proficient with ADP Workforce Now, UKG UltiPro, Paychex, Oracle, SAP Concur, and Workday, along with advanced Excel skills for reporting and data management
- Skilled in payroll general ledger reconciliation and internal audits, ensuring accuracy in payroll expenses, tax withholdings, and compliance
- Experienced in 401(k) and retirement account management, with expertise in equity processing for incentive stock options and restricted stock units
- Proven leadership in team management, knowledge of payroll regulations, labor laws, and skilled in Microsoft Teams, Webex, and Zoom for effective collaboration

Accounts Payable Specialist

#11768

- Bachelor's degree in Business Management & Accounting from the University of Maryland
- Full-cycle AP specialist with experience processing 1,000 invoices weekly
- Managed AP for 30 properties, each with a separate bank account
- Took on AR responsibilities, including collections and ACH payments
- Proficient in Concur, Oracle Fusion, Sage, Dynamics, and Aptech for check processing

AP Manager

#97705

- Led P2P governance for North America, overseeing 6,000–8,000 invoices monthly and \$4B in annual payments
- Implemented automation, including OCR, bots, and ReadSoft, reducing errors and improving invoice processing
- Managed SOX controls, 3-way match validation, and vendor master approvals with APEX and Oracle integration
- Upgraded payment processing, automating domestic and international ACH and wire transfers
- Conducted a six-year audit of \$20B in payments with only one recorded error

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AP Supervisor / Manager

#99311

- Supervised 6 AP Analysts, managing onboarding for 500 vendors, W-9s, ACH/Wire payments, and tax portal transactions
- Processed 1,000+ manufacturing-side invoices monthly using JD Edwards; performed manual invoicing and pricing edits
- Handled weekly check runs, vendor discounts, and 3-way matching with BOLs, invoices, and POs
- Oversaw AP operations across 7 locations; Bilingual Spanish; supported freight and refund reconciliation and online check voiding
- Maintained low turnover; trusted with vendor payment budget and supported 1099 contractor processing

AR Manager

#5900

- Built AR function from the ground up as first permanent hire; led billing, collections, contracts, and credit for perm and locum staffing
- Implemented Bill.com with IT and cross-functional teams; created post-launch enhancements and automated payment reminders
- Reported to CEO; created AR aging forecasts in Excel and dashboards; set up reports for owners and teams
- Managed credit reviews, enforced prepayments, and processed 280 perm invoices weekly in Great Plains
- Handled full AR cycle, from billing setup to collections, working 80-hour weeks during rapid growth phase

AR Specialist

#100516

- Skilled in accounts receivable, collections, international invoicing, and cash application, with extensive experience using Excel and Siteline software
- Responsible for cleaning and reconciling customer accounts, generating AR aging reports, maintaining accurate cash disbursement records, and assisting with bank reconciliations
- Manages logistics for international invoicing, including AES filings, customs documentation, and coordinating freight forwarding and shipping
- Supports outsourced IT issue resolution, assists with AP, and performs general office duties including phone coverage, mail sorting, and office opening/closing
- Works closely with the Accounting Manager to clean up legacy data, transition from outsourced accounting, and maintain reporting accuracy for a \$15M revenue operation

AR Specialist

#46738

- Experienced in cash application, credit management, collections, and generating AR aging reports, with strong attention to detail and accuracy
- Manages high-volume invoice processing, applying payments to correct invoices, resolving discrepancies, and ensuring accurate updates in the AR subledger
- Conducts credit checks using D&B and Experian, prepares trade references, and supports sales and management with approval insights via Excel tracking
- Performs all collections activities independently, including follow-ups and reconciliations, particularly in fast-paced or transitional environments
- Skilled in Excel for AR tracking and reporting, including VLOOKUP for aging analysis, and known for meeting deadlines under pressure without overtime

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Staff Accountant

#101145

- Responsible for booking journal entries for eight bank accounts and completing monthly reconciliations to support accurate month-end closing
- Files monthly sales tax returns in compliance with all regulatory requirements
- Manages unclaimed property in accordance with state regulations, maintaining precise records
- Verifies bank details for all vendors to ensure financial accuracy and prevent discrepancies
- Provides audit support by organizing and verifying documentation related exclusively to cash transactions

Payroll Manager

#101244

- Calculated and managed full-cycle payroll for over 1,200 employees using multiple payroll platforms, ensuring accurate transmission and compliance with state regulations across California, Nevada, Arizona, Florida, Utah, and New York
- Processed union and non-union payroll, including prevailing wages and certified payroll using specialized compliance tracking systems, while supporting timekeeping accuracy and garnishment setup
- Audited and reconciled semi-weekly payroll transactions, reviewed complex payroll activities, and resolved discrepancies related to project payments and system configurations
- Managed PTO and sick pay policies, educated clients on workforce management systems, and delivered training to improve payroll accuracy and client satisfaction
- Oversaw data entry and processing for 5,000+ employees, monitored issues to ensure prompt resolution, and leveraged advanced Excel skills to support reporting and analysis

Prevailing Wage Compliance Specialist

#101199

- Oversaw labor compliance for public agency contracts, prepared job start-up documents, and managed electronic compliance submittals for each project
- Entered payroll data into compliance tracking systems, uploaded records to regulatory portals, and reconciled timekeeping errors by coordinating with payroll teams for adjustments and revisions
- Reviewed and verified fringes, hours, and worker classifications, ensured accurate prevailing wage payments, and maintained knowledge of state and federal public works requirements
- Set up contractors and subcontractors for payroll submissions, corresponded with vendors on records needed for invoice releases, and audited payroll records to resolve hourly discrepancies
- Ran reports to release payments, reconciled discrepancies with agencies, and collaborated with internal operations and accounts payable to track contract values, project timelines, and outstanding invoices

Payroll Supervisor

#40938

- Tracked and administered multi-state payroll for over 600 employees, including union and non-union workers, using timekeeping systems and manual Excel processing
- Calculated payments for hourly, salary, and driver pay, tracked mileage and operational data, and ensured all timecard details were accurate before submission to payroll provider
- Utilized advanced Excel functions such as VLOOKUP, IF statements, and conditional formatting to process piecework calculations, verify breaks, and resolve missing punches
- Reviewed driver paperwork, including logs, fuel receipts, and reports, to ensure compliance and accurate payment calculations
- Prepared daily, weekly, monthly, and quarterly reports, and assisted with process development and improvement initiatives

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AP Manager

#91472

- Directed AP in defense manufacturing, processing millions monthly in Sage 100
- Integrated Medius with Sage, enabling 3-way match and automating invoice workflows
- Improved cash flow, reduced overtime, and cut close time to 3 days
- Created SOPs, videos, and guides to streamline training and system navigation
- Led audit prep and removed vendor prepayment penalties, boosting financial control

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