

**FINANCE EXECUTIVE****Certified Strategic Hands-On Executive Driving Automation and Performance Improvement**

CPA candidate with an MBA in Finance and a Master of Science in Computer Information Systems, nearly a decade as an entrepreneur and over 20 years of corporate experience. Career Highlights:

- CFO for a Private Equity firm overseeing \$35M asset portfolio handling all finance, accounting, merger and acquisition activities for 11 different entities.
- Corporate experience as an Area Sales Division CFO, managed financial organization generating over \$15B in annual revenues and \$7B in OpEx with over 5,000 employees.
- Held unique consulting role during \$25B+ merger between T-Mobile and Sprint managing all Clean Room Finance related activities on behalf of Sprint working with data from both companies to provide forecast for the combined company.
- Started an E-Commerce business during .com boom and built into \$1M/year business selling for profit 6 years later.
- Hands-on skills as Finance, Entrepreneur, and IT professional, including strong leadership, communication, problem-solving, business planning, process redesign, and analytical skills, encompassing areas of strategic planning, financial analysis, reporting, budgeting, forecasting, finance operations, decision support, business case development, and automation and technology / application design. Clear leader with ability to cast a vision, engage a team, and lead that team to implement the vision.

**PROFESSIONAL EXPERIENCE**

**EPUS GLOBAL ENERGY**, Fort Worth, TX

**2018 – 2021**

**Chief Financial Officer / Chief Compliance Officer**

Part-time for 18 months, full-time for about 1 year. Handled financial oversight and compliance for eleven different entities including three private equity funds, a trucking company, a private equity fund manager, and two saltwater disposal companies.

- Partnered with CEO on deals including \$30M acquisition of Oil & Gas Properties in Texas
- Held legal and financial discussions with potential debt partners, equity partners, investors, Investment Bankers and Attorneys
- Investor Relations including potential and existing investors
- Managed financial planning, risk and cash flow of 11 different entities controlled by Epus
- Handled all administration duties for 3 private equity funds including accounting, legal and investment related activities
- Raised capital through investors and financial institutions including Federal loans through SBA

**TECHFİN LLC**, Atlanta, GA

**2018 - 2020**

**Principal Consultant for Sprint (full-time)**

Principal consultant retained by Sprint to participate in clean room activities related to the \$26B merger with T-Mobile. Was the only Sprint representative in the Synergy Finance Clean Room working directly with T-Mobile Finance executives and KPMG consultants to prepare a P&L forecast for the combined T-Mobile/Sprint company.

- Analyzed data from both companies to determine how to bring the data together.
- Worked with employees from both companies, under anti-trust attorney oversight, to put together a forecast for Subscribers, Service Revenue, and Equipment COGS and Revenue
- Worked closely with two T-Mobile employees in the clean room formulating plans to build the forecast and associated models.
- Hands-on approach to building the models necessary to accomplish the forecast task

**Fractional Chief Financial Officer for Epus Global Energy (part-time)**

Provided consultancy services in the areas of Finance, Strategic Planning, Process Automation, Forecasting and Compliance oversight of Private Equity Funds

**SPRINT**, Atlanta, GA

**2016 – 2018**

**Director of Finance FP&A / Operations (East Area Sales Division CFO)**

Managed all Finance strategic planning and operations for East Area Sales Division. Responsible for P&L of over \$15B in annual revenues and \$7B in annual operating expenses and customer base over 15M. Supported field sales organization of over 5,000 FTEs, directly supporting Area President, who reported directly to CEO, as well as 9 Regional Presidents and Sales Operations teams. Hired, led, and managed team of 14 finance professionals (direct and indirect reports).

- Built finance organization from scratch after launch of de-centralized localization plan, which created 18 sales regions, hiring resources, establishing policies and procedures, and creating performance management plans.
- Led and participated in model work, report creation, Hyperion System design, analytics, and decision support of region and area presidents, enabling sales leaders to manage team's performance and driving improvement in financial bottom line.
- Budgeted and forecasted subscribers with over 1,000 intersections by 9 regions, 3 segments, 13 channels, and 3 device types, providing a level of detail necessary for leaders to make informed decisions impacting sales.
- Implemented process and policy changes, while overseeing operating expenses, reducing expenditures and driving higher margin.
- Evaluated performance results monthly, including preparation and design of operations reviews decks, which included analysis, story creation/talk track for sales leaders and color commentary during reviews with CEO, CFO & COO.

**VERIZON**, Basking Ridge, NJ

**2007 – 2016**

**Associate Director – Finance Planning & Analysis – Northeast Area**

**2013 – 2016**

Oversaw all forecasting, budgeting, and reporting of revenue for Verizon Wireless' Northeast Area, encompassing 5 regions. Supported Area Finance VP in preparing reports and explaining results for Area Sales President. Hired, led, and managed team of 4 finance professionals.

- Created \$19B Revenue Budget for multiple streams of revenue (postpaid, prepaid, and Internet of Things (IoT) /Machine-to-Machine), as well as monthly and quarterly outlooks, by creating complex forecasting models based on operational activities.
- Recognized as one of the top Finance professionals in company for Revenue Analytics and Reporting.
- Presented revenue story each month to senior leadership, providing variance analysis for both Budget and Outlook, regularly indicating operational shortcomings and opportunities for action.
- Oversaw Deep Dive Data Analytics, evaluating customer behavior and identifying opportunities for increasing revenue.
- Spearheaded change companywide in terms of Account Level reporting by driving initiative to implement new account fractionalization methodology, impacting both internal and external reporting. Participated in special launch reporting team by collaborating on reporting

**Manager - Finance Planning & Analysis – Headquarters**

**2012 – 2013**

Managed team of 2 finance professionals responsible for producing reporting for senior finance executives, including Wireless CFO.

**Senior Analyst – Finance Planning & Analysis – Headquarters**

**2009 – 2012**

Collaborated on financial planning and analysis reporting team. Responsible for creation and analysis of financial reporting.

**Senior Client / Server Developer Analyst – IT – Alltel / Verizon**

**2007 – 2009**

Led team in application development designing, programming, and implementing web applications for both Alltel and Verizon (after acquisition).

## ADDITIONAL RELATED EXPERIENCE

**Entrepreneur / CEO / Senior Consultant**

Launched multiple companies, including first resume distribution service on the Internet, innovating new kind of service to assist job seekers in finding a job. Additional roles as founder of recruiting company and consultant to various companies.

- Founded company with no debt or investors, generating over \$1M in annual revenue in less than 2 years growing team to 13.
- Evaluated, negotiated, and engaged in agreements with other companies for joint ventures.
- Cast vision for growth while still focusing on customer experience by launching multi-month project and improving capabilities of customer experience representatives to serve customers on first touch.
- Forecast revenue and expenses, including growth costs, capital expenses, and future compensation requirements for both permanent employees and independent sales force.

## EDUCATION

Master of Business Administration (MBA), Finance, Strayer University  
 Master of Science (MS), Computer Information Systems, University of Houston, Houston, TX  
 Bachelor of Arts (BA), Theology / Business, MidAmerica Nazarene University, Olathe, KS

## PROFESSIONAL DEVELOPMENT

Completed all Accounting Courses Necessary to Sit for CPA Exam