

**CHIEF FINANCIAL OFFICER***Blending financial expertise to accelerate revenue growth, and drive profit improvements.*

Strategic and forward thinking executive driving significant growth, slashing operational expense, instituting financial discipline, spinning off non-core product lines, restructuring businesses and consolidating operations. Inspirational leader, known for motivating high performing global teams across accounting, finance, and all aspects of operations from small start-ups to Fortune 1000s, to large PE backed international organizations. Laser focused on comprehensive profit improvement by dissecting performance and overhauling models by product segmentation, strategic pricing and supply chain optimization. Apply financial expertise to drive operational and economic change and revitalize P&L, reimagine business and financial strategies, and push enterprise value to higher levels.

**Areas of Excellence**

Global Finance • M&A Due Diligence • Internal Controls • SOX Compliance • Treasury Management  
Capital Management • Internal & External Audit • Accounting • P&L Management • Budget Management  
Global Financial Planning & Analysis • Financial Reporting • Financial Statements • Risk Management & Compliance  
Operational Controls • Vision & Growth Planning • Team Leadership • Project Management • Change Management

**FINANCIAL MANAGEMENT & BUSINESS STRATEGY EXPERIENCE****ABC GROUP | New York, NY****2015 - Present****US President (2018 - Present) | UK CEO (2017) | Group CFO (2016 - 2018) | US CFO (2015 - 2016)**

**In charge of all aspects of the \$50M US operation including, finance, sales and marketing, HR, IT, quality and risk management for this PE backed business.** Lead the executive team relationship with private equity-led Board of Directors and lender. Define and execute US business strategy as it transitions to a self-funded entity of EDM. As Group CFO, oversaw financial operations of the \$100M international company, additionally serving in a dual role as UK CEO to restructure and revitalize the UK business.

- Generated cash for the business and reduced debt by negotiating the **multi-million dollar sale** of the US records management business of EDM Americas in 2019, including the transition services arrangement.
- Realized a **~\$1.5M savings** in operations by reorganizing EDM Americas leadership team and overhead cost base to align with changing business profile and to deliver targeted cash flow requirements.
- Positioned the business to reach **cash and profitability objectives** by negotiating the transfer of a large US Government loss contract to a competitor.
- Increased cash flow and cash conversion through net working capital management. Improved **days payable outstanding by 20%** and **reduced accounts receivable days by 15%**.
- Stabilized business operations and drove a **\$2M+ cost reduction** program on **\$20M operating cost** as the UK CEO. Restructured operations team to align with realistic revenue and production forecasts.
- Captured a **10% savings** in overhead and production costs within 6 months of joining the company. Right sized the organization by closing 2 production facilities, eliminating 100 positions in operations, sales and marketing, and identifying vendor cost reductions.

**ABC INC. | New York, NY****2013 - 2015****Vice President, Finance**

**Brought on board to lead financial operations for the company's fastest growing and largest segment, the \$1B global LED Lighting business, comprised of commercial channel LED lighting fixtures and retail consumer LED bulb products sold through The Home Depot.** Served as financial expert in definition and execution of competitive sales initiatives and channel partner and national account incentive programs to sustain the segments consistent 15% YoY growth. Collaborated with sales, marketing and operations leadership to evolve an effective sales and operations planning process to balance channel and product mix to continue gross margin expansion.

- Realized a **150 basis point** margin improvement by guiding cost reduction initiatives, negotiating freight cost reductions and reviewing current suppliers to identify cost savings in raw material/BOM cost reductions.
- Key member of the Executive Steering Committee that guided the **\$5M+ Oracle implementation**, which replaced Cree Lighting's internally designed legacy ERP system. Oversaw project planning, timeline management, budget oversight, user functionality and data governance.

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**XYZ INC. | New York, NY****2008 - 2013****Vice President, Finance – North America & Global Operations**

**Directed finance for North America and South America's commercial businesses and global operations, generating \$1B+ in annual revenues across 7 medical device business lines with \$1B+ global supply chain and manufacturing spend.** Identified opportunities to improve gross margins in several businesses and partnered with the EVP of Operations in rationalization of global manufacturing facilities. Exceeded revenue, gross margin and asset management annual plan objectives in 1<sup>st</sup> role as Vice President of Finance for the surgical business.

- Promoted within ~9 months from the Vice President of Finance for North America's **\$50M surgical business** to Vice President of Finance over 7 business units in North and South America with \$1B in annual revenues.
- Improved gross margin **by 100 basis points** by identifying opportunities for product mix and strategic pricing to generate revenue growth and expansion.
- Positioned the business for a **150 basis point** improvement by serving as finance lead for the future transfer of 2 large manufacturing facilities in the US to Mexico.

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**XYZ INC. | New York, NY****2005 - 2008****Chief Financial Officer & Principal**

**Co-founded a finance advisory and investment management firm.** Defined initial budget and operating plan for FY 2010 and established internal structure for finance, administration and legal functions. Collaborated with majority owner and CEO to develop strategy, execute service deliverables and oversee 2 investment funds. Partnered with legal counsel to create fund and LP legal documents for Fund 2.

- Revenue building strategies and operational savvy contributed to **225% revenue growth** from 2009 to 2010 in valuation and advisory services.

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**XYZ INC. | New York, NY****2003 - 2005****Vice President of Finance – Global Vision Care (2004 – 2005)**

**Returned to the US following acquisition by a private equity firm, to oversee all aspects of finance for the \$1.2B Global Vision Care business.** Designed and executed initial strategic plan, focused on product innovation, gross margin expansion through manufacturing and supply chain cost reductions, and investment in global branding initiatives.

- Exceeded initial Global Vision Care annual plan for revenue and EBITDA, delivering **~\$50M in revenue** and **\$12M in profits above plan.** Assessed products and geographies to determine which products and markets to focus on for investment and revenue growth.
- Took on an additional role, serving as GM of the Canada subsidiary. Played key role in Canada's market share position increase in the lens care segment, which **increased by 2%** via merchandising and channel initiatives.

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**Vice President, Asia /Based in Hong Kong (2003 – 2005)**

**Enlisted by the Board of Directors to assume financial management of the Asia business, the company's fastest growing region, a \$500M collection of geographic businesses across 3 product lines.** Led 6 regional functional Finance Directors and 9 country and/or business Controllers in risk assessment and mitigation, FP&A, accounting, internal controls including SOX compliance, regional tax and treasury, regional shared services and capital management. Spearheaded restructuring of Asia's finance organization, improving financial processes, internal accounting and reporting controls, and decision support effectiveness.

- Drove average **annual growth of 15-18%** by spearheading recovery and turnaround of the Asia business. Simplified product offerings, pursued selective investment across countries and businesses and reduced operating expenses in lower margin locations.
- Headed financial and controls process integration for **\$250M acquisition** of a local Chinese manufacturer and seller of ophthalmic pharmaceuticals.

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**EDUCATION**

**Bachelor of Science, Accounting**  
COLLEGE UNIVERSITY, New York, NY

Professional Development  
**Certified Public Accountant, New York (Inactive)**