Financial System Manager & Sr Business Analyst that can bridge the common gap between "Finance", "Operations", and "IT" by professionally translating business objectives and strategies of companies into systems solutions, business intelligence, enterprise risk management, efficient business processes, & reporting innovation.

i.e. a "Business MacGyver" to Make your ERP, EPM, CRM, HRIS, accounting, management, operational, & business information systems and processes "sing" in a very controlled manner.

Value Proposition

- Provide all departments the Enterprise Systems, Information, Data, or Reports they require. (PM/ERP)
- Deliver Solution Blueprint, High Level Solution Design, and Conceptual Application Flow Diagrams.
- Strategic Planning, Forecasting, Modeling, Budgeting as well as the associated Systems, Financial, and Business Analysis. (EPM)
- **15+ Yrs ERP Consulting/ Acumatica, NetSuite, Epicor, Dynamics, SunSystems, OracleCloud**

Management Information Systems	IT Management	Data Integration & Interfaces
Strategic Planning	Systems Analysis & Workflow	Project Management
Project Forecasting & Budgeting	Change Management & Initiatives	Forecasting, Modeling, Budgeting
"Matrixed" or Shared Services	Enterprise Systems Architecture	Info Tech Infra Library (ITIL)
Disaster Recovery	Vendor Contract Negotiations	Program Management
Business Process Improvement	Workflow Analysis	Financial & Accounting Systems
Agile Iterative Software Develop	Resource Planning	Waterfall Software Development
Requirements Definitions	Enterprise Risk Management	Systems Development Life Cycle
SQL Server/Database Management	G&A Expense Variance Analysis	Documentation & Procedures

Career Highlights

Designed, architected, constructed, and executed a global financial information systems infrastructure (ERP/EPM) for large publicly-traded financial services multinational. Established exceptionally flexible management information systems and sophisticated enterprise risk management platforms. Systems withstood breakneck 10-year growth and extreme change management. Utilized creative System Development Life Cycles (SDLC), data flows, precise business process controls, in-depth needs analysis, keen business process reviews, and hybrid development methodologies. (RenRe, MIS Director)

Developed complex Financial Planning & Analysis models using advanced financial software tools and SQL Server for seven vastly different business operating segments. Models dynamically recognized and projected capital requirements, cash flow, ROI, IRR, income statements, and GAAP balance sheets as well as business unit oriented reporting and methodologies. (RenRe, Global Financial MIS Director)

Key Experience

Advisory Architect Visionary /ERP Consultant (2018-Date)

Senior Director Business Analytics - ###, **Property Management** - **Acumatica**
Corporate Governance, Change Management, Financial Reporting, Merger & Acquisition, Private Equity Onboarding and Offboarding, Normalization, Budget, Forecast, Financial Planning & Analysis (FP&A) models, Consolidations, Intercompany, Multicurrency, Translation, Revaluations, International Subsidiary, Process Improvement, Chart of Accounts Design, Financial Report Design, ERP Re-Implementation, and special CEO Projects.

Outdoors, ### Cabinet Group, ### – NetSuite Implementations**.**

Development, ### Industries, ###.com, ###, ### clients
Build SaaS Metrics Dashboard and Analytics, SaaS Salesforce Ramp-Up Plan Accounting & Finance Innovation, Mentoring, Budget, Forecast, Financial Planning & Analysis (FP&A) models. Delivered "What-If" Modelling to design the best "Growth Plan".

CFO & Investor Relations - ### Opportunity Fund – Quickbooks to Intacct conversion.

Chart of Accounts and Financial Statement Redesign, Accounting & Bookkeeping Process Analytics & Design, Improve Real Estate Ventures Financial Reporting, Investor Relations Onboarding, and special CEO Projects.

ERP Consulting Sr. Manager (Architect) *(Supervised 3)*
###, International Financial Services, Consulting, & CPA Firm   34 Clients (9 years)

Handled all the systems consulting and ERP/EPM implementation needs of a wide range of client industries including: banking, hedge funds, retail, fiber optic data services, & 5 different types of insurance sectors. Administered or configured server installations, server upgrades, software installations, network connections, SQL database administration, and Active Directory and Group Policy configuration for the client's information systems. Established risk and control framework in coordination with internal audit staff.

● Provided top-notch implementation services utilizing the systems development life cycle to gather requirements, design solutions, build software iterations, conduct user acceptance testing, perform GAP analysis, conduct user training, go live, and provide support to a wide variety of software.

Global Financial MIS Director (Sr. Enterprise Systems Architect) *(Supervise 3,+ 4 contract)*
###, **International Financial Services (NYSE: ###, $4bil)**
Reinsurance, Consulting, Venture Capital, Risk Mgt, Insurance   (10 Years)

Managed Global Shared Services ERP & EPM projects and systems to execute the business strategy with business processes. Built, operated, and managed global Epicor ERP and MIS systems, providing timely operating and financial information to senior management. Supervision and project management of budgeting, planning, forecasting, reporting, variance analysis, best practices, governance, business intelligence, master data management, and establishing GAAP & Sarbanes-Oxley (SOX) controls. The key liaison and relationship manager between IT, PMO, and Finance.

● Utilized the systems development life cycle to gather requirements, design solutions, build software iterations, conduct user acceptance testing, perform GAP analysis, conduct user training, go live, and provide support to a wide variety of software.
● Administered and configured server requirements, installations, and upgrades, as well as new software installations, network connections, SQL database administration, and Active Directory and Group Policy configuration for the Accounting, Finance, Treasury, and Investments departments.
● Engineered a wide variety of integrated systems and modules including: SQL Server, MS Project, Epicor Suite, Microsoft FRx Analytics Suite, Sage Budgeting & Forecasting Analytics, and custom solutions.
● Provided analysis and reports to support forecasting and budgeting in SEC 10-K, 10-Q, Management Discussion & Analysis (MD&A), Board, and Investor Relations.

Sr. VP, Financial Systems *(Report to COO, CSO, CTO, CFO, Supervise 2)*
Holdings, **Financial Services, Asset Management, Real Estate**   (2 Years)

Company-wide responsibility for architecting global financial, accounting, and reporting systems that derive insights in real time for executive decision making. Operate and administer systems for Financial Planning & Analysis, Budgeting, and Forecasting while providing leadership and guidance to peers and subordinates. Oversee best practices, governance, business process design, consolidations, intercompany eliminations, business intelligence, reporting, and master data management.

• Strong relationships across all levels of the organization including but not limited to C-level Executives, Finance and Accounting VPs, and Product Engineering teams
• Business requirements and business design for translation into technical reporting solutions
• All phases of full SDLC, Project Management, and Project Risk Assessment for multiple initiatives.

Global Director, Mgt Information Systems & Reporting *(Enterprise Sys Architect)*
###, **Intl Storage Appliances, Virtual Desktops, Software, Professional Services**   (2 Years)

Lead all Finance and Accounting (ERP & EPM) Shared Service procedures and provide systems expertise for monthly and quarterly deliverables from investor's reports to revenue recognition.   Manage large projects, teams, programs, and systems in a shared services matrix to execute the business strategy and financial business processes.   Operate and manage global ERP, CRM, and MIS systems, providing timely operating and financial information to senior management, overseeing variance analysis, best practices, inventory costing, governance, consolidations, intercompany eliminations, business intelligence, reporting, and master data management. Providing leadership and guidance to peers, subordinates, and senior management.

● Employ "Scale Appropriate" Business Process Improvement, Controls, Financial Dashboards, and Virtual Close Techniques to support the design and implementation of a reliable reporting capability.
● Design and build processes, procedures, and controls for new Business-to-Business Information Technology Consulting department.

- Create Dashboard / KPIs / Business Intelligence for distribution channels & business unit leaders.
- Analyze and design efficient processes to support Sales, IT, Operations, and Finance departments.

Sr Director Information Systems & Finance (CIO/COO/CFO)
Alliance, **Professional Educational Services & Products**
Provide leadership & support for Operations, Finance, Accounting, MIS, and IT departments.
- IT- Enterprise Systems Architecture, Integrations, ERP Implementation, All phases of SDLC, Project Management, and Project Risk Assessment for multiple MIS and technology initiatives.
- Ops-Oversee the smooth functioning and Business Process Improvement of customer success teams within Program Management, Program Services, Continuing Education, and Office Operations.
- Finance-Manager Financial Planning & Analysis (FP&A), Legal, Tax, Treasury, Payroll, Corporate Governance, Investments, and Banking.

Global Director of Finance & Operations (+ Enterprise Systems Architect)
Group, **International Professional Services for Semiconductor Industry**
Provided leadership & support for Finance, Accounting, Systems, Contract Management & Review, Financial Planning & Analysis (FP&A), IT, Legal, Tax, and Office Management. Provided development of Austin/USA office and new Canadian company and operations, with support for German GmbH and U.K. LTD companies.

- Overhauled and reconfigured all financial and operational software.
- Systems Selection and implementation of Financial Planning & Analysis (FP&A) software.
- Provided timely data and reconciled reports for management that exceeded industry standards.
- Reduced Accounts Receivable by 35%.
- Implement controls and efficient business processes to the operational and financial procedures.

Controller (CFO)/Product Manager (supervise 4)
###, Inc./###, **Manufacturer & Distributor/Puzzles & Games**
Oversaw ERP, accounting, reporting, IT, cost accounting, supply chain, and new game division functions.

- Redesigned accounting, financial planning, and reporting processes.

Controller, HR & MIS Director (supervise 6) (+Sr. Bus. Intelligence Analyst)
Media, Inc./###, **Manufacturer & Distributor/ Stationary, Art, & Crafts**
Provided client workstation & server support, LAN problem resolution, backups and disaster recovery, office security systems, and telephone systems.   Administered or configured server installations, server upgrades, software installations, network connections. Managed ERP, IT, operations, personnel, and all aspects of finance.

- Reengineered finance, IT systems, network administration, and human resource business processes.
- Implemented a wide range of revenue producing and cost cutting procedures and systems to streamline every process and transaction during a very high growth period.
- Provided infrastructure for high-growth, as well as streamlined purchasing and manufacturing cost cutting to support a 375% increase in sales and a 450% increase in employees over five years.

Education

Master of Business Administration, 2003, Information Technology (+ Finance) *summa cum laude*
University of ###
Bachelor of Arts, Business Economics (+ Accounting)
University of ###

Certifications

Certified Information Technology Professional, AICPA
Microsoft Certified Professional, ####, **Series 7**, FINRA (NASD)
AICPA Member, American Association of Certified Public Accountants, ####
Certified Public Accountant, 2001, Illinois ####
Certified Accounting Application Specialist (Microsoft Business Solutions)
Project Management Professional (PMP) in progress, studying), **Lean Six Sigma**, Grey Belt (noncert)

Systems & Software (A+ Level)

ERP
Epicor Enterprise
NetSuite
DynamicsGP (Great Plains)
DynamicsSL (Solomon)
Oracle R13 (EBS/Fusion)
Quickbooks
Acumatica
Accpac
Infor Sun Systems
Platinum for Windows (PFW)
A bit of SAP FICO

CRM
Salesforce

PSA
Power PM
Projector PSA

Budget/Forecast/Modeling
Active Planner
FRx – Forecaster
PlanGuru

SQL
SQL Full T-SQL Sproc, Views, etc..
SQL Integration Services (SSIS)

Reporting
Management Reporter
PowerBI, Tableau
FRx – Financial Reporting Extender
Crystal Reports, Business Objects

Other
Excel(excellent),Concur,Abra,UltiPro
Equity Edge, Dell Boomi

Judge @ ### Venture Labs

Speaker – California State University, Hayward ###