



**SENIOR FINANCE LEADER | OPERATIONAL EXCELLENCE
FINANCIAL PLANNING & ANALYSIS (FP&A)**

Helping leaders align financial plans and operational workflows with stated corporate goals.

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VALUE PROPOSITION

I am a responsible financial leader and business partner with success providing high-quality financial discernment and decision support to senior leadership teams. I am proactive, skilled at leading the process of aligning goals and plans, tracking performance, and using data to help drive decision making. I am a servant leader who builds relationships and promotes collaboration, stewardship, and financial accountability across an organization. Strategic-minded, customer-focused, loyal, results-driven, detailed, flexible, and creative.

TARGET POSITIONS

Titles: VP / Director / Senior Manager

- Financial Planning & Analysis
- Operations Research / Improvement
- Strategic Planning

Industries: Software, Education, Transportation/Logistics, Insurance, Financial Services, Hospitality, Healthcare, Media, Construction, Entertainment.

Sample Companies: Kalkomey, Interstate Batteries, Learfield, Toyota, Cinemark, Capital Senior Living, Main Event, Liberty Mutual, RealPage, Independent Bank.

Size/Location: Preference for medium- to large-sized companies in DFW Metroplex.

PERSONAL TALENT PHILOSOPHY

- A collaborative culture, filled with fairness and mutual respect, results in high efficiency and effectiveness that helps an organization exceed expectations.
- Thoughtful, data-driven decision making keeps confidence high and leads to exceptional results.
- Trust, reliability, and responsibility are key values expected of me, and I expect them of others.
- I aim to make a positive impact, helping a company be better than when I joined.

STRENGTHS – *Performing Engager*

- Belief* – Make sacrifices for things that are important; passionate
- Achiever* – Set the pace for production, hard worker
- Responsibility* – Own and complete commitments, despite obstacles
- Relator* – Genuinely build relationships to foster trust and confidence
- Developer* – Patient with and get satisfaction from the growth of others
- Analytical* – Rely on evidence to understand cause and make decisions

EXPERIENCE

Independent Contractor/Consultant McKinney, TX (2018-present)
Finance Contractor/Consultant for various entities and industry contacts

Globe Life McKinney, TX (2015-2018)

Director of Operations

Fidelity Investments Westlake, TX (2012-2015)

Director of Financial Planning & Analysis (FP&A)

CompuCom Systems Dallas, TX (2007-2011)

Senior Finance Specialist/Manager – FP&A

Freddie Mac Carrollton, TX (2006-2007)

Budget Manager

Greyhound Lines Dallas, TX (1998-2006)

Senior Financial Analyst - progressive finance and planning roles

PROFESSIONAL SUCCESSES

- Installed more effective project management software
- Helped increase sales, reduce DSO and improve vendor relationships
- Eliminated 90% of waste within legacy processes and workflows
- Built-out Center-of-Excellence (CoE) function, 15%+ cost reduction
- Moved FP&A process into Hyperion for better efficiency and accuracy
- Helped revamp operations to yield double-digit growth in EBITDA

EDUCATION

- Master of Business Administration (MBA), University of North Texas
- Bachelor of Business Administration (BBA Finance), Baylor University

ASSOCIATIONS

- Financial Executives Networking Group (FENG)
- Youth Baseball Coach at Baseball Nation
- Middle-school student mentor, McKinney TX