

**Strategic accounting and financial management executive**, with extensive progressive management experience in finance, accounting and operations. Ability to develop and implement strategic initiatives, and provide vision and direction to achieving both strategic and tactical goals. Viewed as a trusted advisor and business partner who gets things done. Core competencies include the following:

- Strategic Planning
- Accounting/Financial Management
- Enterprise Risk Management
- GAAP Expertise
- Systems Implementation
- Contract negotiations
- International Experience
- Process Improvements
- Performance Management

## **PROFESSIONAL EXPERIENCE & ACCOMPLISHMENTS**

### **RTS Consulting, Shoreham NY** **President**

**2013 - Present**

*Financial and accounting consulting practice committed to partnering with businesses and consulting firms on achieving strategic objectives while enhancing future growth.*

- Provide strategic solutions with Kordeleski Consulting, former CEO of \$6 billion credit union and with The Edge Consultancy, a strategic consulting firm for credit unions nationwide.
- Implement an international consolidation reporting system and other process improvements for a major global manufacturer resulting in 15-day reduction in completing monthly board package.
- Facilitate various financial training seminars for banking and manufacturing clients on behalf of Stony Brook University Center for Corporate Education Division.
- Adjunct Professor and academic advisor for Stony Brook University's College of Business and College of Global Studies; teach graduate and undergraduate accounting courses

### **Suffolk FCU, Medford, NY**

**2012 - 2013**

*Full-service financial institution with assets exceeding \$900 million*

#### **Chief Financial Officer**

Responsible for all company finances including investments, accounting, and operations support.

- Managed \$400 million investment portfolio; developed investment strategy improving yields by 5 basis points over an 18-month period.
- Developed and implemented interest rate and liquidity risk strategy mitigating overall balance sheet risk.
- Chairman of Asset Liability Committee; recommended new products, managed deposit and loan product pricing resulting in improved margins without increasing risk.
- Implemented new policies and procedures, reviewed all existing major financial and accounting policies and made necessary changes, all approved by the board of directors.
- Received outstanding rating on all external accounting and NCUA compliance examination audits.

### **Sperry FCU, Garden City Park, NY**

**2010 - 2012**

*Full-service financial institution with assets exceeding \$300 million*

#### **Chief Financial Officer**

Initially tasked as interim CFO to turnaround distressed credit union. Oversaw accounting, finance, information technology, business services, and collections.

- Restructured accounting department, implemented vendor due diligence program, and completed enterprise wide risk assessment resulting in increased productivity and improved credit union examination audits.
- Stabilized financials by reducing \$50 million expense budget by 20% and ensuring loan reserves properly funded. Designed and implemented troubled debt restructuring program.

- Led the development of the Net worth Restoration plan approved by the NCUA. Effectively managed balance sheet and income statement to plan resulting in a consistent return to profitability and marked improvement in capital position.
- Successfully managed all large nonperforming loan participations. Developed various strategies to remove toxic assets with minimal loss to the organization.

**Nassau Educators FCU, Westbury, NY****2008-2009***Full-Service financial institution with assets exceeding \$1.8 billion*

- **Interim Controller** - streamlined reconciliation process, improved fixed asset system, and resolved accounting issues with external certified public accounting auditors.

**Bethpage FCU, Bethpage, NY****2003 - 2008***Full-service financial institution with assets exceeding \$6.0 billion***Assistant Vice President, Financial Planning and Analysis**

Developed finance function by designing and implementing strategic initiatives such as profitability systems, business planning, return on investment, budget and forecast processes and scorecards.

- Key contributor to corporate strategy doubling growth in 5 years as member of Executive Strategic Planning Team.
- Established fiscal accountability and transparency reducing operating expenses by 10%. Introduced budget/forecast process and asset liability/profitability reporting along with financial guidance and support to department managers.
- Developed product profit and loss statements by allocating direct and indirect costs to each product using activity based costing. Product analysis was used to make product line decisions.
- Increased Return on Investment (ROI) with introduction of corporate wide business plans and ROI modeling used to allocate funds to major business initiatives.

**American Express, New York, NY****1995 - 2002***Fortune 50 global financial services firm with annual revenues in excess of \$30 billion***Sr. Director Financial Planning & Analysis, Global Technology Finance (2000 – 2002)****Director, International Operations (1999 - 2000)****Sr. Manager, International Reporting & Analysis (1995 – 1999)**

International consolidation reporting and analysis group. Led International Operations Reengineering initiatives tasked to streamline call center operations and reduce cost. Oversaw two billion dollar technology budget

- Partnered with foreign regional management to analyze local market financial results and identify material variance to plan. Addressed regional business issues, economic and political volatility and foreign currency fluctuations.
- Directed budget process for two billion dollar technology division. Streamlined forecast process and provided costs analysis and commentary to all major Amex business units.
- Led an international cross-functional team charged with developing an executive dashboard which was successfully completed and rolled out worldwide.
- Achieved a 25% reduction in telecommunications costs by leading a global call routing initiative to redirect US call overflow to a more cost effective foreign region.

**EDUCATION**

**New York University Stern School of Business** – Advanced Professional Certificate, Accounting

**Hofstra University Frank G. Zarb School of Business** – Master of Business Administration, Finance

**Stony Brook University** – Bachelor of Arts, Foreign Language/Business Management

**PROFESSIONAL MEMBERSHIPS AND CERTIFICATIONS**

Development Disability Institute Board of Director, Certified Public Accountant Licensed in the State of New York, Six Sigma Greenbelt Certified, member of Financial Executive Network Group (FENG), Volunteer Career Advisor and Writer for Stony Brook University Career Advisor Network