

Accomplished leader with extensive experience in leading financial operations, audits, and strategic planning in diverse industries.

Track record of overseeing complex audits and financial reporting in accordance with GAAP and IFRS, as well as implementing innovative financial systems. Skilled in optimizing financial performance, improving internal controls, and driving revenue growth. Proven excellence in advisory roles with expertise in ad hoc analysis and developing robust models to achieve optimum financial growth and operational excellence. Demonstrated success in building and nurturing relationships with clients, key stakeholders, and executive teams. Articulate communicator with exceptional analytical, problem-solving, and leadership skills; adept at directing, mentoring, and motivating staff to achieve company financial objectives.

Areas of Expertise

- Financial Planning & Analysis
- Financial Strategy Implementation
- Process Improvement & Automation
- Cost Control & Reduction
- Budgeting & Forecasting
- Mergers and Acquisitions
- Cross-functional Collaboration
- Staff Training & Leadership
- Regulatory Compliance

Career Experience

Senior Vice President, Finance | HB Global, LLC & HB Mechanical Group, LLC, Remote

2021 – 2023

Pioneered adoption of Entrepreneurial Operating System (EOS) methodology while serving as strategic planning finance lead. Played vital role as key member of HB Mechanical Group executive leadership team. Maintained consistent collaboration with SVP Operations to provide expert oversight for monthly operational reviews. Devised innovative budget processes through strategic planning and accurate forecasting.

Key Achievements/Contributions:

- Led high-level management of \$800M commercial mechanical contracting enterprise servicing diverse markets across Pennsylvania, Massachusetts, Maryland, Florida, Caribbean islands, and Arizona among eight distinctive brands.
- Steered application of FASB ASC 606 for revenue recognition and performed reviews of monthly WIP reporting and analyses across all eight operating divisions.
- Provided insightful direction to controller and two accountants while overseeing eight dotted-line controller reports for delivering consistent, high-quality financial reports to President of HB Mechanical Group and HB Global CFO.
- Supported standardization of financial practices and the creation of data-driven reporting from warehouse utilizing data from seven disparate ERP systems.
- Spearheaded seamless integration process for two acquisitions into HB Global by conducting due diligence and gap analyses.
- Created new financial reporting standards and KPI reports for ROIC calculations and cash flow metrics to provide critical insights for driving financial performance.
- Oversaw year-end audit process in line with GAAP, liaising with external auditors and the HB Global accounting team.

Corporate Controller | Anthony & Sylvan Pools, Doylestown, PA

2017 – 2021

Provided regular reports to CFO and collaborated closely with director of financial planning and advisory. Implemented and led percentage of completion method for revenue recognition, updating and documenting revenue methodology to align with FASB ASC 606. Devised process documentation and implemented new financial controls. Delivered hands-on oversight of inventory valuations, physical counts, and processing compliance while partnering with division controllers and inventory personnel.

Key Achievements/Contributions:

- Spearheaded financial controls and reporting for \$200M residential pool builder servicing numerous markets, including Pennsylvania, New Jersey, New York, Maryland, North Carolina, Texas, and Nevada.
- Revolutionized finance organizational structure for team of 30 employees, enhancing cross-training opportunities and career growth by creating supervisory roles and divisional assistant controller roles.
- Directed team of eight key personnel, including division controllers, corporate accounting manager, and accounting specialists to ensure operational and service excellence.
- Steered transition through ERP system integration, taking lead in system changes and resolving integration issues with AP automation.
- Pioneered new financial reporting system within ERP system, enhancing financial reporting capabilities and insights.

Directed and executed audit services for annual financial statements prepared in accordance with GAAP, IFRS, and income tax basis. Fostered long-lasting and trusted relationships with key clients in primarily real estate and construction industries. Assisted in due diligence engagements and purchase accounting to improve financial integrity of business transactions.

Key Achievements/Contributions:

- Administered services for approximately 20 clients annually by delivering consistent, high-quality financial expertise.
- Provided leadership and guidance to approximately 15 associates within audit and private business services groups.
- Boosted staff retention by cultivating positive and engaging working atmosphere.

Senior Audit Manager | PricewaterhouseCoopers, Philadelphia, PA**2015 – 2016**

Provided top-notch service to key clients across diverse industries such as manufacturing, packaging, distribution, and software aimed at meeting distinct financial needs. Specialized in audit reporting within private company services group. Conducted thorough audits and analyses of purchase accounting and complex equity structures.

Key Achievements/Contributions:

- Oversaw 10 client audits annually, each ranging from 3K to over 6K hours.
- Mentored and delivered leadership coaching to approximately 30 associates within the PCS group.
- Directed and executed audit services for interim and annual financial statements in alignment with GAAP, IFRS, and cross-border accounting manuals for component audit reporting.

Senior Audit Manager | CBIZ & Mayer Hoffman McCann, P.C., Plymouth Meeting, PA**2012 – 2015**

Offered advisory services and specialized expertise in cost and construction accounting, catering to specific financial needs of construction and manufacturing sectors. Implemented audit and attestation services for financial statements for interim and annual periods, prepared in strict accordance with GAAP.

Key Achievements/Contributions:

- Led 20 associates throughout comprehensive audit process, nurturing collaborative and high-performing team.
- Engaged in proactive business development by participating in over four real estate and construction industry associations, while serving as board member for two associations.

Additional Experience

Manager, Wouch Maloney & Co, LLP, Horsham, PA

Staff Accountant, Heffler Radetich & Saitta, LLP, Plymouth Meeting, PA

Education

Bachelor of Science, Accounting, Elizabethtown College, Elizabethtown, PA

Certified Construction Industry Financial Professional (active until 2019 - currently inactive)

Certified Public Accountant, Pennsylvania, 2009 (active)