

Employment

Adludio, Inc.

Head of Operations-US

July 2019 - Present

- Develop, establish, and direct execution of US operating processes to support global company objectives.
- Create, communicate and implement the company's vision, mission and overall direction within the US Territory.
- Execute business strategies for company products and services. If applicable, negotiated contracts for partnerships.
- Establish the performance goals, allocate resources, and assess policies for Sr. Management.
- Direct short-term and long-range planning and budget development to support global business goals.
- Partner with Global CFO to oversee all of US Accounting and generate insightful financial reports to help make strategic decisions.
- Facilitate efficient communications and workflow across all stakeholders and teams through the US Territory.
- Work Closely with UK Management to institute efficient tools, systems, and processes in place to drive global growth.
- Oversee HR & PEO for US Territory: strategic recruitment, on/off boarding, performance management, handbook, insurances, benefits, and payroll.
- Provide direct management, supervision, and professional development for entire Client Services.
- Work with Co-Founders to evaluate expansion into new territories.
- Have a deep understanding of product offerings to support consultation on campaign strategy to ensure success.

Various Companies (Available upon Request. NFP included) Management Consultant - Finance & Operations Feb 2016 – June 2019

- Effectively created and implemented all aspects of financial and operational systems: fiscal year budgeting, financial reporting and modeling, payroll, AR/AP, strategic platforms for pricing, SOP's, and working capital for growth and fundraising.
- Hired and negotiated contracts with external partners including legal, banks, web developers, insurance brokers, IT, and all other necessary vendors. Monitored performance and budget adherence. Over 20 years of comprehensive PEO experience.
- Established HR framework: PTO, talent acquisition, on/off boarding, benefit portfolio, 401K, compliancy, professional development, and handbooks
- Developed well defined job descriptions/KPI's and sales process based on specific performance criteria. Defined functional and reporting structure with the result of improving performance, profitability, and clarity.
- Designed the system architecture for financial fiscal years, pricing model, file-sharing/storage, and internal/external communication.
- Collaborated with co-founders to create strategic initiative to explore marketing growth opportunities, identify key risks, and increase brand awareness.
- Analyzed and monitored monthly/annual fiscal budget against income statement and P&L to forecast and allocate company expenditures. Including FP&A and financial modeling.
- Coordinated semi – yearly financial audits for organizations and its subsidiaries.
- Oversaw legal and regulatory compliance and proper filing of tax returns. GAAP Knowledgeable.
- Procured and negotiated new office space leases. Designed, sourced, and installed all aspects for the organization's new office space.
- Oversaw rebranding and implementation of various digital marketing strategies.
- Worked with the IT department to address daily concerns and developed long term methodologies for business practices.
- While at Odyssey Impact / Transform Films, served as the primary liaison from the organization to the Finance, Investment, and Audit committees. Ensure accurate and timely financial reporting and narrative to Board of Directors.
- Provided direct management, supervision, and professional development for teams
- Coordinated weekly meetings with legal counsel to solidify global copyrights and trademarks.

Atlas Talent Agency, INC

Chief Financial/Operational Officer

Jan 2000 – Jan 2016

- One of the founders of a commercial talent agency serving Fortune 500 clientele globally with annual revenue of \$45-50 million.
- In 2006, was promoted to the title of CFO/COO from Director of Operations and Finance.
- Fully devised and oversaw the existing financial methodology by which accounting reconciled our various bank accounts, paid monthly bills, monthly reporting to match the forecasted budget.
- Managed strategic day to day operations for offices in Los Angeles and New York City. Sourced, negotiated contracts, and manage relations with all outside vendors.
- Oversaw bi – monthly/year-end payroll procedures, benefits administrator, funding for pension, and year-end reviews.
- Oversaw annual federal and state tax strategies/payments, contracts and compliance.
- Designed and implemented billing software for accounting and entire sales team. As well as the collection process for those monies in AR. Increased collection by 40%.
- Crafted sales representatives' business development, structuring of accounts, and analysis of monthly/yearly commission metrics. Annual aggregate increases of 5-10% while reducing operational expenditures by 10%.
- Provide direct management, supervision, and professional development to team of six.

Don Buchwald and Associates

Executive Assistant

Aug 1997 – Dec 1999

Skill Set Proficient in Xero, QuickBooks, Pipedrive, Workable, Sage, Woo Commerce, Salesforce, Slack, Egnyte, IQMS (ERP), eClinicalWorks (EMR), Excel, G-Suite, Trello, Bill.com, Teamwork (project management), Mindbody, Microsoft Office, and Streak.

Education

New York University School of Professional Studies:
Financial and Public Accounting

2005 – 2006

University of Texas – Austin, Texas
BS - Double Major Biochemistry and Microbiology

Fall 1994 – Spring 1997
Dean's List/Honor Society

Emory University – Atlanta, Georgia

Fall 1993 – Spring 1994