

STEVE SAMPLE
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PROFILE

Financial Executive delivers crisp focus in leading and navigating complex business challenges. History of documented excellence in profit, process, and quality improvement.

- ◆ **Results Driver** using Process Redesign and Cost Reduction Focus on Profit, Working Capital, and Cash Flow (multimillion-dollar annual improvements in profits and costs)
- ◆ **Technical Expert** in International Business Accounting and Processes (11 years Big 4–SEC Companies)
- ◆ **Process Improvement Champion/Fast Learner** using Key Financial Measures
- ◆ **High Performance Natural Work Team Creator and Coach** leading by example
- ◆ **Creative Problem Solver/Solution Provider** using "Big Picture" Analysis and "Flash" Reports
- ◆ **Proactive Producer** using Persuasive Negotiation with Third-Party Suppliers to Achieve Efficiency

MAJOR ACCOMPLISHMENTS BY INDUSTRY

Financial and Operations

- ◆ Identified opportunities, performed research, developed and implemented Treasury and Finance Initiatives which improved parent company profit \$7.5M, including \$2.5M for subsidiary in XXXX.
- ◆ Advanced annual cash flow \$10M using fourth-quarter initiatives to support parent company objectives.
- ◆ Managed balance sheet; designed and delivered annual cash flow targets in 5 of last 5 years. Delivered capital targets in 3 of 3 years. Created treasury vision and built comprehensive model to automate treasury process. Banker applauded model as "best in class." Eliminated accounts receivable reserve.
- ◆ Developed and planned corporation implementation program for Sarbanes-Oxley legislation.
- ◆ Trained parent company finance team who fully transferred to the subsidiary accounting process in October XXXX in accounting and operations to achieve a successful XXXX international close.
- ◆ Identified potential audit issues and presented documentation to external auditors to avoid \$1M audit adjustment in XXXX; no adjustments were proposed by auditors in XXXX.
- ◆ Performed financial institution and real estate audits, including loan loss reserve review, irregularity investigation, and public filing. Promoted profitability through operations redesign and acceleration.
- ◆ Led preparation of SEC documents for initial public offerings for oil and gas companies. Served as Quality Assurance Manager for audit of Fortune 500 oil and gas refiner and marketer.
- ◆ Proposed and supported procurement team in achieving \$1M credit line, the first direct credit line ever provided to a customer by the international supplier.
- ◆ Achieved multimillion-dollar expense budget. Negotiated significant customer and vendor settlements.
- ◆ Detected and documented misstatement of company's financial statements. Produced over 100 internal audit adjustments. Corrected cash and retained earnings. Reduced audit costs by 50%.

Human Resources and Employee Benefits

- ◆ Reduced workers' compensation liability reserves proposed by insurance adjusters \$.7M in XXXX using a special review process involving four corporate areas, avoiding a \$.5M charge to the income statement.
- ◆ Led XXXX Year-End Restructure Proposal process, resulting in \$1M of approved restructure costs.
- ◆ Received recognition from benefits consulting company for Canadian pension and non-pension benefits financial analysis. Recognition identified very positive impact in the practices of the business units.
- ◆ Created 401(k) benefits document. Streamlined 401(k) benefits process, reducing administrative costs 25%.
- ◆ Built process to manage pending health insurance claims from prior years for five companies.
- ◆ Implemented new banking and legal arrangements for medical, dental, vision, and flexible benefits plans for four companies in two weeks.
- ◆ Envisioned and constructed first human resource department, including legal policies, lawsuit prevention program, talent selection, and employee benefits. Senior responsibility for HRIS payroll conversion.
- ◆ Taught over 500 hours of annual professional education in accounting, management, and industry courses as senior trainer.

- ◆ Persuaded top management to expand benefit option, including dental, disability, health, life, cafeteria, and 401K choices, at nominal company cost.
- ◆ Researched and proposed executive compensation plan for legal partnership and corporation.
- ◆ Devised and launched employee recognition program. Established employee board and several recognition levels and awards.
- ◆ Successfully defended various labor claims. Developed legal support, constructed factual documentation, and delivered credible testimony.
- ◆ Created and implemented talent search process to build high-performance teams. Designed employee referral program. Improved search efficiency by 33%.

PROFESSIONAL HISTORY

COMPANY NAME – CITY, STATE

XXXX-XXXX

Consumer Sales/Services - Provider of financial products and services to 3500+ financial institutions. 2,200 people at 19 manufacturing plants and service centers in 12 states. \$.3 B annual revenues.

Assistant Vice President-Accounting (Led Shared Services Team of 25), and Treasurer
Controller-North America (\$1B+), 11 entities and Treasurer – 2 concurrent positions
Director Treasury Services/Treasurer (including Consolidated Statements)
Financial Consultant for CFO and Senior Finance Leaders (including U.S./U.K. Reports)

Senior accounting leader working as a business partner across sales divisions and operating units. Full responsibility for technical research, audits, compliance, consolidated reporting, general ledger, balance sheet, cash flow, and treasury. Defined and embedded controls in accounting, reporting, and Group Health Plans. Led executive team who wrote strategic vision for Texas Performance Excellence Award. Collaborated and shared best fiduciary practices with national bank customers.

Honors and Awards

- ◆ Proactive Leadership Award from CEO for exceptional client service.
- ◆ Special Business Award from CEOs for improving shareholder value.
- ◆ Superior Contributor Award (limited to top 5% of associates).
- ◆ High Associate Opinion Survey results for building and inspiring teams

COMPANY NAME – CITY, STATE

XXXX-XXXX

Law firm performing corporate and insurance defense work for clients in south Texas.
Law Firm Administrator, San Antonio, Texas

COMPANY NAME – CITY, STATE

XXXX-XXXX

Full-service public accounting firm.
Senior Practice and Audit Manager, San Antonio and Houston, Texas
Specialized in public filings and litigation support.

EDUCATION

Master of Professional Accounting, Graduate School of Business

BA - Business Administration, High Honors
Phi Beta Kappa, Junior Fellow Nominee

UNIVERSITY OF TEXAS AT AUSTIN, Texas

PROFESSIONAL AFFILIATION

C.P.A. Admitted to Practice in Texas
Member, The Institute of Internal Auditors