

# CFO

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## SELECTIONS

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### Neville Wellman

#### Qualifications Summary

Seasoned management professional with over twenty years' experience in strategic planning, finance, and operations. Serves as a mentor to others in sharing knowledge and experience to empower all levels of the organization with focus on mission, vision, and sustainability. Collaborates with senior management and board trustees in areas of responsibility for internal controls, budgeting, annual audit and tax returns, legal and regulatory matters, and long-term planning. Active in stabilizing organizations and providing leadership to promote sensible growth.

#### Professional History

Oregon Ballet Theatre	COO	2013 – 2019
Portland Playhouse	Executive Director	2011 – 2013
Wellman Financial Group	Consultant	2007 – 2013
Sterling Savings Bank	Vice President, Senior Corporate Manager	2006 – 2008
US Bank	Vice President, Senior Portfolio Manager	2005 – 2006
United Commercial Bank	Vice President, Team Leader	2001 – 2005
City National Bank	Vice President, Senior Relationship Manager	2000 – 2001
The Pacific Bank	Vice President, Relationship Manager	1991 – 2000

#### Accomplishments

- Engaged and advised key decision makers of private and nonprofit organizations in business planning and operations.
- Guided revenue based budget process over multiple fiscal years culminating in approved budgets that included new programs and equitable compensation for company staff, while maintaining an annual surplus and building cash reserves.
- Formalized financial reporting process to Board of Trustees with monthly report, ensuring transparency, accuracy and timeliness of information, while increasing the level of understanding and trust with key stakeholders.
- Ensured compliance with all federal, state, and local laws in regards to financial and human resource issues.
- Advised and established measurable benchmarks on maintaining sustainable growth, liquidity and leverage while creating an appropriate finance structure, and negotiating terms to mitigate impact of potential risks.
- Developed and managed portfolio of diversified clients with revenues from \$500,000 to \$200M.
- Structured financial accommodations from \$50,000 to \$40M for nonprofit and privately held organizations.
- Successfully structured and/or rehabilitated clients who experienced economic and/or management challenges, resulting in a zero loss rate on respective client portfolios.
- Managed all aspects of finance, investment, legal, information technology, human resources, and facilities functions.
- Led staff on payroll, compensation, risk management, workers compensation, and insurance and benefits administration.
- Reviewed and approved all agreements for employment, collective bargaining, contractors, vendors, and licensing.

#### Education and Certifications

- Bachelor of Arts in Business Administration, University of San Diego