

QUALIFICATIONS SUMMARY

Results-oriented finance and accounting executive with more than 25 years of experience leading accounting, financial planning and analysis, treasury, revenue operations, and business systems initiatives for nonprofit and private organizations. Active CPA with expertise in strategic planning, mergers and acquisitions, financial reporting, internal controls, and ERP implementations. Recognized for partnering with executive leadership to improve operational performance, support organizational growth, and deliver scalable financial solutions.

PROFESSIONAL HISTORY

CFO Selections	Consultant	2026 – Present
Visiting Media	Controller	2021 – 2026
NWEA	Vice President of Finance	2017 – 2021
NWEA	Director of Accounting & Finance	2007 – 2017
Olson & Sims, CPAs	Audit & Accounting Manager	1999 – 2005
Communication Internetworking Supply Corporation	Accounting Manager	1995 – 1999

ACCOMPLISHMENTS

- Directed financial due diligence and financial modeling efforts that resulted in a \$22 million private equity investment.
- Led budgeting and long-range financial planning for an organization with an annual budget exceeding \$170 million, providing leadership with actionable financial insights to support strategic decision-making.
- Developed and implemented company-wide policies and procedures that increased operational efficiency and generated approximately \$2.5 million in annual cost savings.
- Managed treasury and investment activities for up to \$50 million annually, optimizing returns while maintaining adequate liquidity and supporting organizational objectives.
- Achieved more than ten consecutive years of clean external audits with no findings through strong internal controls, process discipline, and regulatory compliance.
- Led implementation of enterprise systems including Oracle NetSuite, Salesforce, Zuora, Concur, Paylocity, and BILL.com, improving reporting capabilities, operational efficiency, and internal controls.
- Directed acquisition due diligence, financial modeling, and post-acquisition integration activities, including multi-entity accounting structures and financial systems integration.
- Established multi-state sales tax compliance by implementing a reporting solution across jurisdictions with nexus requirements.
- Built and led high-performing finance organizations, mentoring and developing multiple team members into manager and director-level positions.

LICENSES & EDUCATION

- Certified Public Accountant (CPA), Oregon
- Bachelor of Science in Accounting, Santa Clara University