

PHILIP CASE

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EDUCATION

Master of Science | Finance/ Statistics / Accounting -- Seattle University: *Seattle, Wa -1996*

Bachelor of Arts | Finance / Information Systems -- University of Washington: *Seattle, Wa -1995*

CEH | Certified Ethical Hacker – EC Council

EXPERIENCE

May '22 –current '22 **Software Engineer-Web Developer** | **AV8FlightStream**

Aug '19 –Apr '22 **Assistant Airport Manager** | Cedar Valley Airport UT10

Aug '18 –Dec '19 **Director of Public Relations** | S&L Incorporated: Lindon Utah

- Managed all social media and public engagement functions for the company

Jan 16 ' –Mar '18 **CFO** | Knights Amour LLC : Lehi Utah

- Managed all aspects of the startup general ledger, financial reporting and financing sources

Oct '12 –Feb '15 **Director of Cost Accounting & Revenue Strategy** | Capstone Nutrition: *Ogden, UT*

- Managed raw material cost accounting for \$150MM spend portfolio for OTC pharmaceutical company
- Prepared analytics, financial models and quote/costing metrics for CFO and Private Equity shareholder
- Executed corporate pricing and revenue strategy, reporting directly to the CFO
- Created price quotes for new product development
- Developed predictive costing models using Monte Carlo simulation and regression statistics

Apr '11 –Dec '11 **CFO** | WorldTrans Logistics Services: *San Diego, CA*

- Managed all elements of the P&L and Balance Sheet for a \$30MM revenue logistics company
- Crafted a cost restructuring plan that turned the firm profitable after successive years of losses
- Administered all aspects of the company's 401k and profit sharing plans and health benefits plan
- Collapsed the month-end close cycle from 10 days to 5 and automated 75% of all financial reporting
- Directed all elements of bringing the General Ledger and Financial Reporting to GAAP compliance

Dec '10 –Apr '11 **Consulting Controller** | TGG Capital (Private Equity): *San Diego, CA*

- Established accounting controls and month-end close procedures for 12 small-cap companies
- Developed full financial statement reporting package for investors and small business owners
- Managed team of Staff Accountants and Accounting Managers on multiple client engagements

Oct '09 – Nov '10 **Sr. Financial Analyst** | Bard Access Systems: *Salt Lake City, UT*

- Developed financial forecast models and 5-year strategic plan for oncology division of CR Bard

- Created monthly income statement variance analysis reports for \$550MM of revenue
- Managed division-wide Capital Equipment sales and lease program for \$80 MM
- Managed the sales commission program of \$20 MM annually for 250 territory managers
- Directed financial reporting consolidation for 5 international manufacturing plants
- Managed month-end close process for all accruals and SOX compliance

Jan '08 – Dec '08 **Sr. Financial Analyst** | Thinkorswim Group Inc: *Chicago, IL*

- Developed financial forecast models & directed weekly executive review with CEO and CFO
- Developed a competitor analysis team staffed with 3 financial analysts and directed their focus
- Drafted Management Discussion & Analysis section of 10K/10Q SEC filings
- Created all tables and associated footnotes for the 10K/10Q SEC filings

Nov '03 – Dec '07 **Managing Director Consultant** | Case Group LLC: *Lehi, Utah*

Jun '97 - Aug '03 **Associate Vice President Investment Banking** | JPMorgan: *New York, NY*

- Executed billion dollar M&A transactions across all industry sectors
- Created accretion/dilution models and complex valuation analysis for deal execution

Jul '88 - Oct '98 **Combat Engineer : Logistics Staff Sergeant** | United States Marine Corps