**STEVEN M. LIPSMAN**

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[**Click Here For My VBA Programming Site**](https://sites.google.com/site/vbaautomationbystevenmlipsman/)

[**Click Here For My LinkedIn Profile**](http://www.linkedin.com/pub/steve-lipsman/1a/41b/272)

**SUMMARY OF QUALIFICATIONS**

* Expert in Excel, Access, Word, Outlook, PowerPoint, Lotus Notes and Reflections-Fundmaster MS Visual Basic for Applications (VBA) and writing Structured Query Language (SQL) data extraction procedures in VBA using ActiveX Data Objects (ADO). Intermediate skills working with PL/SQL, SQLDbx, Python and HTML.
* Experienced in utilizing the most advanced features of MS VBA to automate, among other things: **(1)** worksheet/document design and data entry, **(2)** data analysis and manipulation, **(3)** data import and export, **(4)** complex database queries, **(5)** cross-application processes, **(6)** error handling and **(7)** document security. Click on my site link above for greater detail.
* Skilled software developer with extensive experience providing creative software solutions for legal, accounting, finance and marketing professionals.
* Experienced software development and implementation Project Manager.
* Former practicing corporate/securities attorney and CPA with substantial knowledge of securities and corporate law, accounting concepts and the financial markets.
* Strong analytical, organizational, written and verbal skills.

**WORK EXPERIENCE**

**11/17-Pres. MS VBA/SQL/Access Developer for Empl. Data Series Applications**

IL Dept. of Employment Security, Chicago, IL (Full-Time Contract)

* Using Excel and Access VBA, update and enhance employment time series data management and analysis process for employment projections. Migrate Access data tables to SQL Server back-end database. Also update, enhance and develop other employment data analysis applications.

**8/16-Pres. MS VBA/SQL Developer for Rebate Accounting Applications**

Essendant, Deerfield, IL (Part-Time Contract)

* Using Excel VBA, update and enhance customer rebates Excel application and troubleshoot, update and enhance other applications.

**2/17-Pres. MS VBA/SQL Developer for Work Order Applications**

Glenn Rieder, Inc., Milwaukee, WI (Part-Time Contract)

* Using Excel VBA and SQL ADO, update and enhance work order management and various other reporting tools.

**7/14-9/17 MS VBA/SQL Developer for Reporting Applications**

Northern Trust Asset Management, Chicago, IL (Part-Time Contract)

* Designed automated Client Solutions Excel-PowerPoint tool to prepare monthly PowerPoint presentations. Designed Bloomberg data feed charting tool that enables users to create multiple charts, each with multiple data series overlays. Also designed other Excel-based reporting automation tools.

**6/12-8/17 MS VBA/SQL Developer for Database Management Application**

Appraisal Research Counselors, Chicago, IL (Part-Time Contract)

* Maintained and enhanced existing commercial appraisers’ Access database and reporting system for client.

**9/16-8/17 MS VBA/SQL Developer for Data Cleansing Application**

AMLI Residential, Chicago, IL (Part-Time Contract)

* Designed data cleansing application in Excel that imports data from various vendor files, cleanses/normalizes the data and then outputs it as text files for import into the client’s Oracle database.

**11/16-7/17 MS VBA/SQL Python Reports Developer**

Western Asset Management, Pasadena, CA (Full-Time Contract)

* Designed automated reporting tools querying client’s Oracle database and other data sources utilizing VBA, SQL, PL/SQL, SQLDbx and Python.

**9/15-2/17 MS VBA/SQL Developer for Reporting Applications**

Astellas Pharma US, Inc., Northbrook, IL (Part-Time Contract)

* Designed contract resource management and various other reporting tools, including an organizational chart creation tool. Maintained and enhanced Access medical database.

**9/16-10/16 MS VBA/SQL Developer for Data Management Tool**

Allstate Insurance, Northbrook, IL (Part-Time Contract)

* Designed applicant and activities tracking and management database tool in Excel that automates the data entry and analysis process for new Uber-like roadside assistance program.

**9/15-4/16 MS VBA/SQL Developer for Reporting Applications**

FitchRatings, Chicago, IL (Part-Time Contract)

* Designed data management and various other reporting tools.

**7/14-5/15 MS VBA/SQL Developer for Restaurant Data Analysis and Reporting**

McDonalds, Oak Brook, IL (Full-Time Contract)

* Maintained and enhanced various Excel reporting tools. Redesigned a 15-year old Excel VBA application that previously took 7-8 hours to run on a server so that it now runs in under 2½ hours. Achieved similar time savings by redesigning related Excel VBA applications. Redesigned 8 separate archaic applications into a state-of-the-art consolidated reporting tool utilizing the highest level of "Best Practices" development techniques.

**5/10-4/15 MS VBA/SQL Developer for Commercial Planning Analysis Apps**

MillerCoors, Chicago, IL (Full-Time and Part-Time Contracts)

* Designed Excel Gross Income Planning and related Access database tools for client’s annual planning analysis process.
* Redesigned/enhanced (1) Price Promotions Calendar tool that imports SharePoint data and (2) a complex forecasting model.
* Redesigned/enhanced multiple Excel/VBA applications for performing sophisticated commercial planning/market investment analysis for consumer goods company.
* Designed a sales promotions data collection and aggregation tool.
* Designed Excel/Access VBA/SQL product distribution/assortment management tool.
* Designed Excel VBA/SQL product swap decision-making tool.

**6/14-10/14 MS VBA/SQL Developer for Auto Leasing Data Analysis and Reporting**

Wheels, Inc., Des Plaines, IL (Part-Time Contract)

* Completed and enhanced existing auto leasing database and reporting apps for client.

**2/14-9/14 MS VBA/SQL Developer for Retailing Data Analysis and Reporting**

Freeosk, Chicago, IL (Full-Time and Part-Time Contracts)

* Designed automated kiosk service execution reporting tool. Designed Fedex/UPS package tracking tool that extracts tracking data from Fedex/UPS tracking web sites. Developed numerous other retailing service, inventory and customer data analysis and reporting tools.

**4/11-2/14 MS VBA/SQL Developer for Various Accounting Applications**

TTX Company, Chicago, IL (Full-Time and Part-Time Contracts)

* Redesigned/enhanced Excel VBA/SQL applications for leading railcar company for accounting for (1) month-end cost accounting reporting, (2) invoice tracking, (3) invoice payment management and (4) receivables aging.

**9/11-12/13 MS VBA/SQL Developer for Inv. Mgmt. Business Applications**

Northern Trust, Chicago, IL (Full-Time Contract)

* Designed sophisticated tax lot and many other reconciliation tools to automate the tedious task of back and middle office investment account reconciliation work. Designed tools to import data contained in PDF files to Excel worksheets and format the results to look identical to the source PDF files. Designed complex Lotus Notes database reader to organize and automate any user's massive daily incoming email set. Designed complex client issues management dashboard tool. Designed complex Excel VBA database program interface for importing key daily financial transaction data from various file formats and then uploading this data to client’s IBM Reflections/Fundmaster DB. Designed additional Excel/VBA/SQL reporting tools.

**8/13-11/13 MS VBA/SQL Developer for Loan Review Reporting Application**

National Republic Bank of Chicago, Chicago, IL (Part-Time Contract)

* Developed a loan review reporting tool for managing the loan review process for a small Chicago bank. Also developed various other document management tools.

**8/11-10/13 MS VBA/SQL Developer for Database Mgmt. & Reporting Application**

Topco Associates LLC, Skokie, IL (Full-Time and Part-Time Contracts)

* Developed a database management and reporting tool for managing the progress of new product label design work. Developed additional tools as needed to assist in this project management task.

**8/11-12/11 MS VBA/SQL Developer for Management Planning Application**

Northwestern Mutual, Milwaukee, WI (Part-Time Contract)

* Designed a VBA programming tool for management goals planning, data collection and aggregation.

**8/10-9/11 MS VBA/SQL Developer for Rebate Accounting Applications**

United Stationers, Inc., Deerfield, IL (Full-Time and Part-Time Contracts)

* Designed Excel/Access VBA/SQL applications for Fortune 500 business products company for accounting for (1) vendor allowances, (2) sales force commissions, (3) customer rebates and (4) product rebates.

**2/10-4/10 MS VBA/SQL Developer for Economic Damages Analysis Application**

Smith Economics Group, Ltd., Chicago, IL (Part-Time Contract)

* Designed Excel/VBA application for performing sophisticated economic analysis for injured/deceased loss projections.

**10/09-2/10 Project Mgr./Programmer for Custom MS VBA Financial Applications**

Titus, Chicago, IL (Full-Time Contract)

* Performed analysis and designed Excel/VBA applications to automate complex financial reporting requirements, including applications handling **(1)** an Intercompany Service Cost Sharing Model, **(2)** APB 11 Calculations and **(3)** Tax Reconciliations.

**6/07-4/08 Project Manager for Testing, Training and Implementation of Major**

**Upgrade to Accounting Software Package for $1.5B+ Company and**

**Business Analyst/Software Developer for Design and Development of**

**Excel and Access-Based Automation Software for Financial Reporting**

Wheels, Inc., Des Plaines, IL (Full-Time Contract)

* Performed systems analysis and designed Excel-based applications to automate numerous financial reporting requirements. Also, performed comprehensive review of all existing database reporting tools to identify, document and streamline the future use of such tools.
* Serving as Project Manager for the Finance Department, worked with the controller and accounting, IT and QA staff to manage the very successful implementation of a major upgrade of the existing accounting software used by the client company. Tasks included:
* Developing work plans, test cases and schedules for testing, training and implementing the new accounting software;
* Working with users and stakeholders to document business requirements and create a timeline and implementation cycle;
* Planning, organizing and leading weekly project status meetings; and
* Organizing training materials and scheduling training sessions taught by the vendor software company’s representative.

**10/06-2/07 Business Analyst/Project Manager for Design and Development**

**of Access-Based Accounting Database Software Programs**

Harris Bank/Bank of Montreal, Chicago, IL (Full-Time Contract)

* Working with one expert-level Access developer, responsible for the design, development, testing and delivery of a database program to automate accounting processes for parent-subsidiary accounting. Served as liaison between end-user financial analysts and primary database programmer. The primary program for this contract imports complex annual and monthly accounting data from Excel spreadsheets, validates and stores the data in an Access database, and generates monthly and other periodic reports for the subsidiary accounting department.
* Also personally designed, developed and wrote all the code for three additional Excel/VBA-based programs that automate the forecasting process for multiple bank division accounting departments.

**1/90-12/10 Software Designer/Developer/Sole Proprietor**

LegalDoc Software Corporation, Chicago, IL

* Designed, wrote, marketed, sold and continuously supported and maintained ***The Blue Sky Filer****.* This software automated the state and federal compliance process for securities offerings. The program operated on a platform designed to handle the document assembly requirements for all areas of a legal and/or regulatory compliance practice. It utilized the most advanced features of Microsoft Excel, Word and VBA to create strikingly fast, extremely user-friendly document assembly software applications with minimum programming time and effort.
* ***The Blue Sky Filer*** has had over 250 clients since its inception in 1990, providing automated legal document preparation for some of the largest law firms in the country, as well as a number of small mutual fund companies, investment advisors, real estate developers, oil & gas developers and commodity pool operators.
* Developed and wrote ***The Automated Corporate Minute Book,*** which generated all of the organizational documents necessary for Delaware, Illinois and Iowa corporations. This software automated the process of preparing all commonly used state forms, as well as all forms of corporate minutes.

**1985-90** **Attorney, Corporate and Securities Law**

Much Shelist Freed Denenberg Ament & Eiger, P.C., Chicago, IL (1988-90)

Gottlieb and Schwartz, Chicago, IL (1987-88)

Chamberlain, Hrdlicka, White, Johnson & Williams, Houston, TX (1985-87)

* Represented various startup companies in raising capital through the sale of securities. Issuers included real estate, oil & gas and commodity pool companies.
* Drafted numerous agreements and other documents in connection with a wide variety of general corporate transactions.

**1984-85** **Attorney, Tax Law**, Touche Ross & Company, Dallas, TX

* Researched tax law issues and processed annual tax returns.

**EDUCATION**

University of Texas School of Law, J.D., 1984

Publication: Lipsman, *Exemptions Under the Texas Securities Act: A Logical Framework For the Practicing Attorney*, 22 Hous. L. Rev. 725 (1985)

University of Iowa, B.B.A., High Distinction, 1981

Major: Accounting; Concentrations: Calculus, Economics and Finance

**PROFESSIONAL LICENSES**

Admitted to Texas and Illinois Bars in 1984 and 1987, respectively.

Received CPA certificate from Texas State Board of Accountancy in 1985.