November 23, 2011

J. Morrissey & Co.

289 Broad St.

Windsor, Connecticut

J. Morrissey:

Please consider me for the **Director, Financial Planning & Analysis** position at the investment management products company.

I have held financial positions for large insurance companies, as well as

mid-sized firms which were undergoing growth. My primary role was performing financial modeling, accounting, budgeting & forecasting.

My skills are very common to the position:

* **Investments** – Managed an insurance company’s $100 million fixed income portfolio; analyzed common & preferred stocks; traded securities, monitored investment performance against peers and internal goals; managed banking, custody and security transfer requirements; handled NASDAQ reporting requirements; earned the Chartered Financial Analyst (**CFA**) certification.
* **Financial Planning** –Drove the budget process; developed predictive financial models; shared monthly financials widely to raise performance expectations; ensured sufficient cash flow to support operations and product development; established ROI models to assess capital investments. Strong Excel skills.
* **Corporate accounting** – Managed monthly closing and reporting; created financial metrics and operational dashboard reports; merged multiple locations into consolidated financials; worked with outside accountants on accounting pronouncements and annual audit; prepared tax returns; evaluated & strengthened internal controls; earned Certified Internal Auditor (**CIA**) credential.

Academically I have these credentials:

* **MBA** – Corporate Finance
* **CFA** – Chartered Financial Analyst
* **CIA** – Certified Internal Auditor

I am used to covering all business requirements in order that others can focus on operations. Mine is a diverse background which can stretch to address whatever needs to be accomplished.

If this background matches what you are looking for, I’d very much like to meet with you.

Sincerely,



Ted Pritchard

Ted Pritchard

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― *Financial & Investment Management* ―

Tango Strategy (consumer products research) – CFO (2006-present)

* Handle finances, contracts and backroom support for a group of consultants & researchers in constant motion nationwide.

Syvox Corporation (software) – CFO (2002-2007)

* Raised $19 million in equity and debt from venture capital investors to finance growth and product line expansion for 80-employee company (rev $7m)
* Integrated U.S. & European results into consolidated financials with performance measures and sensitivity analysis
* Managed contracts, leases, insurance, tax & banking requirements

Biostar Corporation (medical devices) – CFO (1998-2002)

* Developed offering prospectus for this venture capital-backed firm (rev $20m), leading to its acquisition by Thermo Electron, a $4 billion public corporation
* Oversaw manufacturing – reducing inventory, streamlining workflows, implementing employee-initiated improvements and outsourcing non-critical processes
* Managed equipment leases, government contracts, employee benefits and insurance

Renaissance Entertainment – CFO (1994-1997)

* Managed finance & accounting, SEC reporting and analyst relations for this NASDAQ firm (rev $4m)
* Consolidated divisional accounting from five locations into a unified system
* Selected and managed conversion to Great Plains accounting software

Centre Reinsurance (Bermuda) – VP Finance (1990-1994)

* Provided financial planning & business analysis for large-risk international reinsurer with 110 employees, $5 billion in assets and $735 million in capital, majority owned by Zürich Insurance
* Established collateral trust and letter of credit facility with J.P. Morgan
* Created operating policies & expanded employee benefit program

GTE Reinsurance (Bermuda) – Financial Manager (1987-1990)

* Controller for the Life & Disability Insurance subsidiary
* Chaired process improvement team among Underwriting and Actuary departments
* Installed new accounting system (Solomon) and forecasting model

Advisory Roles:

Blue Sky Bridge (child services) – Board Chair / Treasurer (2006-2009)

* Oversaw finances & board member for child & family services agency; recruited new Executive Director to revitalize services
* Eliminated outreach services where results could not be quantified

Knollwood Water District – General Manager/CFO (1999-2009)

* Ran operations and finances for municipal water distributor
* Upgraded and modernized mechanical equipment
* Built relationships with other municipalities for sharing equipment, manpower and expertise during emergencies

Colorado Academy of Art – Advisor (2005-2008)

* Developed strategic plan to reduce debt, minimize cash, and expand services
* Built marketing plan to build customer awareness and expand services

Education: **MBA** – University of Connecticut

**BA** – Trinity College

**CFA** – Chartered Financial Analyst

**CIA** – Certified Internal Auditor

Member: CFA Institute

Institute of Internal Auditors

Bermuda Society of Financial Analysts – President

Financial Executives Networking Group (FENG)

Institute of Management Accountants

CFO Roundtable

