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# QUALIFICATIONS & PROFILE

Finance Senior Professional with progressive experience in finance, operations, financial planning & analysis, forecasting, budgets, analyzing trends, strategic planning & implementation, cost reduction specialist working in dynamic companies within diverse industries and multinational marketplaces from start-up entities to $500 million companies.

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## Merger and Acquisition Management Strategic Planning, Forecasting and Development CFO / Accounting, SOX and Finance Operations Project Management

**Corporate Divestiture and Acquisition Investment and Cash Flow Management**

**Systems Implementations and Enhancements Controllership and Monthly Financial Statements**

# Professional Experience:

## Laser Power Systems (Green Energy Startup) – Bethel, CT 04/10 –01/23 Finance Director/CFO

* Design and lead the budgeting/forecasting processes across all depts, including R&D and G&A.
* Provide Project Manager skills and analysis to numerous development and client’s projects.
* Direct all Accounting and Business functions, including Patents and Trademarks.
* Maintain the General Ledger and upgraded to a new Accounting software package with new chart of accounts.
* Oversee all transactions and postings to the Balance sheet.
* Manage monthly financial reporting and proactively communicate findings and variances to leadership team.
* Manage business development deals including contract review and financial analysis.
* Develop business case financial models and projections.
* Develop tools, systems, processes and procedures to increase finance dept efficiency and effectiveness.
* Build strong banking relationships and monitor the company credit lines.
* Develop presentations for several investors for $200M financing deals with brokers, private investors and public companies.
* Present and clearly articulate the financial results of the business as well as various initiatives and strategies to the executive Team Leaders.
* Train and develop the finance team and ensure that the team’s work products are produced in an accurate timely fashion.

**PECO Pallet** – Yonkers, NY **11/07 – 03/10**

## Senior Finance Manager – Operations and Service Groups

* Developed the budgets for operations and service groups for the annual and semi-annual planning processes.
* Developed financial /analysis reports that connect the day to day activities, which included manufacturing costs to higher level financial results, measuring the effectiveness and goals of the Operations and Service groups.
* Supported the monthly close process, prepared journal entries, prepared financial reports and variance analysis to the budget of the business.
* Reviewed G/L transactions proactively during month prior to month end close for discrepancies.
* Worked effectively with the Operations group in driving repair and manufacturing costs and transportation costs down by 45%.
* Prepared dashboard, charts and consolidated data by BMO for weekly Operations meetings with VP and Directors.
* Participated in the improvement plan to reduce damage rates from 36% to 24% with the service group.
* Prepared the monthly BOD Operations and Service Slides with high level month end results and commentary.
* Developed and managed support staff.

## Mark Jacobs Consulting 8/00 – 8/07

*Thomson Financial –A/R Project Manager*

* Drove the A/R initiatives set by upper management to reduce the outstanding A/R balance from $20M to $12M for the Investment Management group by the end of Qtr4 2006.
* Provided technical support and re-direct review processes between collections and sales team.

*JP MorganChase –Finance Mgr/VP Investment Bank*

* Provided support as a team member for the financial planning analysis annual / quarterly budget processes.
* Streamlined corporate procedures to engage global IB businesses in effectively executing restructuring strategy
* Directed staff to perform month end close process which included journal entries, updating the global balance sheet and preparing the monthly financial reports with variance analysis.
* Directed a comprehensive asset mgmt program strengthening IB CIO’s delivery performance.
* Prepared the financial reporting model relating to the $58 billion JP Morgan Chase merger with Bank One; present monthly financial results to an IB division CFO.
* Partnered with firm-wide groups in enhancing tracking of costs and synergies with M&A activity.
* Streamlined corporate procedures to engage global IB businesses in effectively executing restructuring strategy.

*Sanofi-Aventis – Finance Mgr for R& D*

* Responsible for the financial control of metabolism and oncology clinical studies, including the development of the annual plan / budget and quarterly plans, general ledger transactions for clinical trial expenses.
* Provided financial packages for management which included tracking and analyzing R&D expenses against Plan and Forecast, review of patient enrollment curves, and patient grant spending.
* Prepared clinical study models and assembled the required financial documentation to support the Central Finance review and approval of these new phases of clinical studies.
* Implemented and maintained efficient financial processes/systems that provide effective financial control analysis and reporting of all R&D expenses for each assigned clinical study.
* Reviewed R&D contracts, contract amendments, and invoices for each assigned clinical study.

*Martindale-Hubbell, Inc. - Finance Manager Acquisition of eAttorney*

* Managed the G/L integration process for eAttorney BU, monthly close process and P&L reporting.
* Managed the integration of eAttorney operations including fulfillment, billing and cash collections.
* Led the strategic planning process and investment reviews across all products lines.
* Reviewed potential acquisitions to gain market share using NPV and breakeven analyses.

*Martindale-Hubbell, Inc. - Finance Manager Divestiture of Marquis Who’s Who Division*

* Responsible for the monthly close process and presentation of financial statements.
* Developed strategic relationships with Investment Bankers, External Auditors and Potential Buyers during due diligence process.
* Acted as a strategic partner through the 8 months of transition services agreement.

*Cummings Partners, LLC. – Controller*

* Performed accounting functions, including A/P, A/R, general ledgers transactions all revenue and expenses, bank reconciliations, and inventory asset accounting.
* Analyzed income statement, expenses, balance sheet and cash flow.
* Performed breakeven / cost benefits analysis and product costing.
* Developed the 2001 & 2002 budget, revenue scenarios and cash flow projections for all Partners.
* Performed payroll functions, including federal and tax filing requirements.
* Performed audits on 2001/2002 revenue and expenses accts and implemented significant changes.

## Lucent Technologies, Inc. – Warren, NJ 5/97 – 7/00 Finance Manager – Service Provider Network (GSP) – CFO

* Responsible for consolidated monthly management results, forecasting and outlook reports.
* Facilitated monthly call meetings with customer teams to investigate any expected shortfalls of revenue and overrun of expenses from plan prior to 7th workday of book close.
* Provided support to the business of North America Channels in the preparation of a monthly management results packages which included analysis of actual to plan for the month, quarter and year to date.

## Controller / Business Manager – Inferno Network Software Venture

* Directed the finance and business functions, including business planning / analysis, payroll, forecasting , product costing and contract management.
* Partnered with SAP consultants to successfully implement and test SAP modules for the Inferno business unit.
* Managed the staff utilizing SAP modules for accounting functions including general ledger transactions, procurement and financial report generation.
* Coordinated the development of the Inferno venture $15 million expense budget and monitored performance and variances to ensure that the budget goals were met.
* Investigated booking errors and managed assets that resulted in a savings of $350K to the Inferno expense budget.
* Prepared business cases for potential joint ventures that generate revenue growth.
* Developed and prepared global contracts for the sale of Inferno software products and services.
* Prepared the fiscal year budget and quarterly financial forecasts and presented them to Lucent upper management.

**College of Aeronautics** – Queens, NY **9/95 - 4/97**

## Director of Financial Planning & Analysis

* Directed the financial planning & analysis, forecasting, and budgeting tasks for a Non-Profit organization.
* Developed strategic long & short term financial planning, financial modeling and data communication.
* Supported the monthly close process, preparing financial reports and variance analysis to the budget of the organization.
* Prepared and presented financial analysis to the President, faculty, staff and the Board of Trustees.

## William Nicholas Bodouva & Associates – New York, NY 6/93 - 9/95 Assistant Controller

* Managed the financial day-to day operation of a family-owned and operated business.
* Increased the company’s cash flow by 35% in six months and managed the accounts receivable of $12.5 million for all clients.
* Participated in several financial audits with outside clients increasing the company’s revenue from 15% to 30%.

***VARIOUS ENGINEERING POSITIONS:***

## NEW YORK POWER AUTHORITY – White Plains, NY *3*/90 - 5/93

**Project Engineer, BWR Licensing**

* Prepared and Presented to Power Authority management Technical Specification changes and amendments to the FitzPatrick Nuclear Power Plant Operating License.
* Performed quantitative analyses regarding licensing documents issued to the Nuclear Regulatory Commission.

## PUBLIC SERVICE ELECTRIC & GAS – Hancocks Bridge, NJ *5*/89 - 3/90

**Senior Staff Engineer, PRA Group**

* Provided quantitative and technical support on the Hope Creek Probabilistic Risk Assessment (PRA) which included research, analytical computations, and comparisons of statistical data to testing and

industry standards..

* Measured risk parameters for numerous safety related systems of the plant to various approved industry standards

## NJ STATE DEPT. OF ENVIRONMENTAL PROTECTION – Trenton, NJ *5*/87 - 5/89

**Project Engineer, Bureau of Nuclear Eng.**

* Reviewed utility management decisions and analyzed the capacity and efficiency of the operation of 4 nuclear power stations in NJ.
* Supported the accidental assessment team during real-time response situations.

## SCIENCE APPLICATIONS INTERNATIONAL CORPORATION – New York, NY *5*/82 - 5/87

**Staff Scientist, Advanced Technologies**

* Responsible for managing assigned projects with profitability studies, budget and cost/revenue analyses and the preparation of proposals to potential clients.
* Completed quantitative analysis using research, analytical and statistical skills for Probabilistic Risk Assessment projects.

***COMMUNITY SERVICES:***

## THE EPISCOPAL CHURCH OF ST. MARY-IN-THE-HIGHLANDS – Cold Spring, NY *9*/08 - 2012

**Treasurer and Vestry Member**

* Prepare all accounting and financial reports including banking relationships, accounts payables, budgeting, and presenting monthly financial results and recommendations to the Vestry.

# Education:

**MBA - Finance,** Manhattan College, Riverdale, NY,

**Masters - Mechanical Engineering,** Manhattan College, Riverdale, NY,

**BE** - **Mechanical Engineering,** Manhattan College, Riverdale, NY,

# Computer Skills:

Microsoft Excel, Microsoft Word, Microsoft PowerPoint, Microsoft Access, Microsoft Dynamics (Navision), SAP System R/3, Great Plains, PeopleSoft, Hyperion and QuickBooks