

# RESUME SAMPLE, CPA

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## CHIEF FINANCIAL OFFICER

OPPORTUNITY CREATOR ▶ TURNAROUND ARCHITECT ▶ GROWTH & ACQUISITION STRATEGIST

### FINANCE EXECUTIVE AND OPERATIONAL TRANSFORMATION LEADER

#### 25 YEAR TRACK RECORD IN INFRASTRUCTURE PLANNING, ACQUISITIONS, DIVESTITURES, AND RAISING CAPITAL

Visionary and strategic leader with a strengths-based, hands-on approach. Uncovers and capitalizes on opportunities to drive revenue, business, and EBITDA growth, catalyzing increased valuation in public and private companies across multiple business sectors. Achieves dynamic results in start-up and growth environments by identifying and alleviating resource/knowledge gaps, creating systems to measure and improve performance, and effectively leading and managing change. Possesses the experience and acumen necessary to identify, benchmark and accelerate bottom-line performance against key business metrics.

#### LEADERSHIP COMPETENCIES

*Transformation & Change Management*  
*Equity & Debt Financing*  
*Developing Strategic Partnerships*  
*Risk Management & Strategic Planning*  
*Systems Design & Process Reengineering*  
*Investor Relations & Capital Calls*  
*Talent & Performance Management*  
*Sarbanes-Oxley Compliance & Internal Controls*

#### Executive Career Highlights

- ▶ **Instrumental in raising \$XM private equity** for start-up biotechnology firm during over 1,500 worldwide investor presentations.
- ▶ **Structured and closed an \$XM acquisition for Company**, securing \$XM in private equity and \$XM in debt financing.
- ▶ **Led capital restructuring/strategy that increased Company valuation.** Integral in multiple transactions and systemic improvements to maximize acquisition value and fund long-term growth.
- ▶ **Negotiated global expansion for privately held healthcare manufacturer.** Added \$XM in incremental revenue and achieved 50% EBITDA growth against only a 23% increase in sales.

## FINANCE CAREER HISTORY

### COMPANY, City, State – Chief Financial Officer (M/YYYY – Present)

Overhauled and aligned systems, processes, and controls. Conducted an exhaustive finance, management and operations review then deployed an enterprise improvement strategy to transform decision-making and analysis.

- **Integrated six acquisitions** as lead on due diligence and negotiations for multiple targets ranging from \$300K to \$5M.
- **Realized \$3M+ in annualized cost savings** via leadership of several business, HR, and IT transformations: *Platform*, for employee mileage tracking (\$1M); *Platform* Durable Medical Equipment management software (\$1M), re-negotiation of *Platform* pharmacy benefits management (\$750K), and consolidation of medical supply vendors into *Platform* (\$250K).
- **Fundamentally altered executive decision-making and planning capabilities** via implementation of XXX Business Intelligence, and deployed a world-class suite of BI reports using real-time, cloud-based trending and analytics.
- **Developed operational key performance indicators (KPIs) and a detailed, metrics-based budget model.** Introduced a cash management strategy that maximized liquidity and fostered a more holistic financial planning approach.

### COPMANY, City, State – Chief Financial Officer (M/YYYY – M/YYYY)

Architected and implemented best-in-class systems and reporting for rapidly growing privately held hospice agency challenged by an undersized and underutilized financial, accounting and administrative infrastructure.

- **Orchestrated due diligence, multi-year forecasts, negotiations, and integrations** on multiple transactions, including an \$XM deal closed Q4YY.
- **Developed enterprise systems and strengthened controls as part of a strategic acquisition/growth plan.** Eliminated inconsistencies in systems, reporting and governance, and sustained intense due diligence during multiple transactions.
- **Transformed cash management and dramatically improved cash flow** by initiating ACH, consolidating bank accounts into a ZBA structure, and closing gaps in invoicing and supplier management protocols.
- **Safeguarded workers' compensation liability while slashing overall costs \$XK** as lead on transition from fully insured to a high deductible program. Implemented detailed safety protocols and comprehensive training.

**COMPANY, INC., City, State – VP/CFO, Treasurer and Corporate Secretary (M/YYYY – M/YYYY)**

Created viable, SOX-compliant systems and internal controls for publicly traded (OTCBB: XXXX), a \$XM medical device business with a revolutionary barcoded surgical sponge product line. Resigned after a shareholder challenge forced out the CEO and four Board members in June YYYY.

- **Transformed SEC filings and transfer/issuance accounting.** Overhauled Form 10-K, Form 10-Q, Proxy Statement, Form S-8 and Section 16 reporting and introduced SAS-70 compliant, automated stock option/warrant accounting.
- **Orchestrated a detailed, five-year project model** that maximized business and revenue gains. Targeted efforts and funding around talent acquisition in key sales regions across the US.

**COMPANY, INC., City, State – VP/CFO Officer, Treasurer and Corporate Secretary (M/YYYY – M/YYYY)**

Devised models, reporting structures, and internal controls to stabilize processes and sustain viability for a publicly traded (OTCBB: XXXX), a development-stage biotech whose cash burn rate would have exhausted remaining \$7M capital within twelve months.

- **Raised \$XM through venture capital, institutional and individual investments** via PIPE (Private Investment in Public Equity), activating global investors during 1500+ presentations in the US, Europe and Asia.
- **Positioned the company to meet all operational performance milestones throughout five-year tenure.** Provided transitional leadership for changeover to virtual operations.

**COMPANY, City, State – VP, CFO & CIO Officer and Chief Information Officer (YYYY – YYYY)**

Led process improvements and galvanized systemic change that rescued the company from flat sales and eroding margins/earnings, which were complicated by cyclical downsides and no clear turnaround strategy.

- **Cultivated international alliances** to expand trade opportunities, creating \$XM in additional business.
- **a multi-phased business growth strategy**, leveraging aggressive management of AP/AR and inventory to fund technology investments, accelerating EBITDA growth by 50% against 23% sales growth.
- **Reduced OPEX by \$XM** through business process reengineering. Achieved scalability within core practices to accommodate growth with zero fixed cost inflation.

**CORPORATION, City, State – Practice Manager/Senior Principal (M/YYYY – M/YYYY)**

Earned Consultant of the Year along with fast-track promotion. Managed \$XM revenue responsibilities and a high-performing team of seven on Company Financial and Project Application efforts, including an \$XM Company Financial Suite implementation.

**EARLY CAREER**

**COMPANY, City, State – Sr. Area Controller/Division/Assistant Division Controller** M/YYYY – M/YYYY

**BIG 4, LLP, City, State – Senior Auditor/Staff Auditor/Intern** M/YYYY – M/YYYY

**EDUCATION AND LICENSURE**

**UNIVERSITY, City, State**  
**BS in Accounting/Finance**

**UNIVERSITY**  
**Management Development Program**

**STATE**  
**Certified Public Accountant (CPA)**