

Business Advisory Consultant

Highly-accomplished, results-driven leader with 10+ years of executive experience. Demonstrated ability to grow and scale business operations and processes to keep up with company revenue growth from \$10m to \$47m (\$53m Pro Forma) in revenue from 2009 to 2021, primarily through bolt-on acquisitions. Key leader in Mergers & Acquisitions process from due diligence through integration. Highly-developed management skills in coaching new managers in accelerated growth positions, and developing their management skills in turn, to grow and scale the company's leadership at a rapid pace.

CORE COMPETENCIES

- Accounting & Financial Management
- Manager Coaching & Development
- Project Management
- Business Planning, Budgeting & Rolling Forecasting
- Financial Analysis & Reporting
- Operational Restructures of Departments, Positions and Processes
- M&A Due Diligence & Integration
- Leadership & Team Building
- Technical Writing

WORK EXPERIENCE

Key Process Partners – Highland MD

Feb 2022 – Current

Owner

- Provide recurring consulting services to business owners in the service industry to help them grow their business and improve their profitability (target clients \$5m - \$25m in revenue)
- Provide recurring accounting services to business owners as a strategic accounting partner (target clients \$1m - \$10m in revenue)
- Provide recruiting packages for hiring managers looking to improve their hiring process to attract and retain the right candidate the first time
- Provide consulting services on a project basis in the areas of finance, operations, mergers and acquisitions, talent management, recruiting, efficiency, and optimization

American Pest Management, Inc. – Fulton MD

Oct 2009 – Dec 2021

Company Purchased by Anticimex in Sept 2016—Stockholm, Sweden, an investment of EQT Private Equity

Vice President of Operations

Jan 2020 – Dec 2021

- M&A (Mergers & Acquisitions) Project Leader for bolt-on acquired companies, including due diligence and integration
- Monthly, quarterly, and annual financial reporting and commentary to the Board of Directors and senior leadership
- Key leader in the twice-a-year budget and business planning process, as well as rolling forecast (3 mos.) submitted by leadership team members
- Lead various company initiatives and special projects from inception to completion to improve efficiencies and optimize processes
- Strategic partner in creating and implementing plans to scale the business from \$13M in 2016 to \$47M in 2021(\$53M pro forma)
- Accountability leader in achieving corporate objectives, including setting goals and OKRs (Objectives and Key Results) for our management team
- Cross-department Strategic Liaison using written and verbal communication and leveraging strong relationships between operating units to reduce information silos and align department objectives and results
- Coach and develop high-potential employees as first-time managers
- Lead weekly training sessions to non-financial managers to improve their business/P&L financial acumen
- Create scheduled and ad-hoc custom data reports to analyze customer and revenue information to increase sales

Prior Roles: Vice President of Finance (2018-2020); Director of Finance & Efficiency (2016-2018); Controller (2011-2016); Accounting Manager (2010-2011); Executive Assistant to the CEO (2009–2010)

Key Accomplishments at American Pest:

- Successfully integrated 15 bolt-on acquired companies in four years, totaling \$40M in revenue, overseeing due diligence and integration processes (2017-2021)
- Created and shared best practices for M&A due diligence and integration with sister companies across the US to standardize and streamline our processes (2017-2021)
- Restructured customer communications center resulting in a 60% decrease in lost calls with no additional personnel costs (2017)
- Named point person on the due diligence process when American Pest was sold to Anticimex, and received accolades from the broker on completing due diligence faster and easier than any company of our size in their history due to being very organized and having high-quality data (2016)
- Using input from team members, created a technician pay plan to achieve pay transparency and communicate paths for increased compensation and career growth (2016)
- Created collections procedures to streamline collections process, decreasing Over 90 accounts receivable from 25% to 7% and DSO of 29 days (2016)
- Committee Chair (two-year term) of Copesan Financial & Administrative Committee (CFAC), a team of finance leaders from other US pest control companies in the Copesan network (national pest control sales company) (2015-2016)
- Overhauled our ERP (12-month project) to update current information, reduce mistakes, increase efficiency, and make training of new hires easier (2013)
- Created accounting procedures manual to document all of our processes, resulting in substantial decrease in mistakes and training time for new hires (2012)

Life Care Centers of America – Cleveland, TN (Fortune 200 privately-held company)

Tax Accountant – Corporate Tax Services

Nov 2006 – Aug 2009

- Prepared Federal and State income tax returns for over 100 partnerships and S Corporations, including quarterly projections for estimated tax filings
- Researched tax issues and prepared memos on technical issues for company's upper management
- Processed monthly and quarterly sales tax returns for facilities
- Entered assets for depreciation and assisted with year-end close for facilities
- Key Accomplishments:
 - Increased efficiency of tax projections and income tax return preparation by streamlining the process using macros (Excel VBA) to reduce repetitive processes, saving over 150 hours of work
 - Completed the most asset depreciation closes during the 2009 season within the least amount of time of any team member
 - Only department member chosen to assist Vice President of Tax with preparing the owner's annual tax return

OTHER SKILLS:

Language

Spanish: Seven years of study, fluent proficiency in reading, writing, and speaking

French: Equivalent four years of study, intermediate proficiency in reading, writing, and speaking

Communication (Written and Verbal)

Highly skilled at written forms of communication, including technical writing and copy editing

Comfortable with public speaking and presenting information to audiences

Technology

Advanced Excel experience, extensive formula writing and data analysis, including Excel VBA (Macros)

Knowledge of the following selected software: Microsoft Office (including Office 365); SmartSheet; Asana; Trello;

Quickbooks; ADP; Workday; AvidXchange; Exago ReportWriter; TurboTax; RIA Checkpoint

Typing speed 120 wpm

Academics

National Merit Scholarship (awarded by university)

EDUCATION

Golden Gate University School of Taxation **2007-2008**
4 Masters-level Courses: *Tax Research, Advanced Federal Taxation, Property Transactions, Partnership Tax* - GPA 3.5
Southern Adventist University, Collegedale, TN **May 6, 2007**
B.B.A. in Financial Services, Accounting Concentration – GPA 3.64
Long Reach High School, Columbia MD – GPA 3.67 unweighted **May 2003**
CPA eligible

VOLUNTEER EXPERIENCE:

Board Treasurer, Luminus (2024-Current)
Board Member, Community Ecology Institute (2024-Current)
CASA worker (Court-appointed Special Advocate), Voices for Children (2023-Current)
Board member, Howard County Board to Promote Self-Sufficiency (2023-Current)
Council member, Johns Hopkins Howard County Medical Center foundation (2023-Current)
Committee member, Leadership Howard County General Membership Committee (2024-Current)
Committee Chair, Howard County Chamber of Commerce Legislative Affairs Subcommittee for Business Operations & Regulations (2022-Current)
Mentor, Ohana of Howard County (2020-Current)
Leadership Howard County Leadership Premier Class of 2023 member (2022-2023)
Volunteer Recruitment Committee Co-Chair & Board Member of Ohana of Howard County (2020-Current)
Director of Young Adult (ages 18 – 35) ministries for the Maryland area for the Seventh-day Adventist Church (2010-2015)
Local Church Youth Club Director - 30 volunteer staff members and over 80 students (2010-2011)
Tutoring in English, Math, and Spanish for high school students (2005-2010)
English Tutor through FIRN (now called Luminus) (2009-2010)
Mentor to foster children through the Youth Villages program (2008-2009)
Community service day site coordinator--Big Brothers Big Sisters of Chattanooga (2007)
Project Leader, Presenter, and Member of Students in Free Enterprise (SIFE, now called Enactus) (2005-2007)
Volunteer (Business Manager) at an orphanage in El Salvador (2005-2006)
Student Mentor to college freshman (2004-2005)