

# JAMES FINANCE, MBA

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## CHIEF FINANCIAL OFFICER | DIRECTOR OF FINANCE

FINANCIAL DECISION MAKER | CASH FLOW/PROJECTION | ROI STRATEGIES | CORPORATE REVENUE GAINS

- Pragmatic and results-oriented senior financial executive with a distinguished career providing executive support to trigger profitability, and seamlessly coordinate financial planning and reporting processes for high-growth organizations.
- Noted track record of driving business development and knowledgeable financial solvency initiatives, process improvement strategies and efficiency enhancements across a broad range of industries.
- Operational CFO with a solid grasp of emerging technologies, cost containment and human capital requirements that serve as the foundation of tactical initiatives, strategic business plans and performance
- Expert in merger, acquisition, relocation, and consolidation initiatives for million-dollar entities. Collaboratively participates in the development of financial, operational, and strategic plans and programs; translates strategic and tactical business plans into financial plans.

### FINANCIAL LEADERSHIP EXPERTISE

- Direct Enterprise-Wide Operations
- Annual & Ad-Hoc Financial Reporting
- Turnaround & Change Management
- GAAP Standards & Benchmarks
- Profit & Loss (P&L) Management
- Due Diligence, Risk Mitigation
- Control Cash Projection/Flow
- Implement Global Revenue Changes
- Drive/Support Recurring Revenue
- Financial and Corporate Management
- Develop Long Term Corporate Vision
- Direct/Monitor All Spend Activity

## EXECUTIVE HISTORY

### 2007 to Present: Smart Company, Inc., Los Angeles, CA

#### 2012 to Present: – V.P. of Finance and Operations

Promoted to VP of Finance/Operations to spearhead transformation of enterprise model to SaaS on behalf of this highly successful software company, which generates \$6.3MM annually as provider of software to the call center industry; direct enterprise-wide operations, quality management, workforce management, software solutions development, call recording, and data analysis.

“James possesses the ability to provide excellent leadership and strategic insight on financial requirements of the company by looking and understand all aspects and needs of the organization. By having the ability to understand what is needed for the strategic direction of the company he can make financial decisions that are both short term financially beneficial to the company without having long term impact to Smart’s strategic vision.”

**John Doe, Chairman and President, Smart, Inc.**

- Partner with Chairman and Founder to onboard new CEO acquired to revitalize sales strategies and integrate new marketing concepts; strategic consultant instrumental in providing key decision making support for loans, new talent, rolling two year plans, and long-term vision, with recovery of declining revenue and client loyalty.
- Maintain strict control of cash projection and flow; successfully reign in superfluous spending with tight budget control, direct involvement with all spend requisitions, and personal/CEO consulting for over-budget scenarios.
- Slash non-critical marketing spends, reduce capital expenditure projects, and cut out 3<sup>rd</sup> party developers to focus on switch upgrade processes. Saved \$50k through negotiation of new system and maintenance contract.
- Lead and facilitate financial management structures – corporate finance, sales operations, contracts, and IT infrastructure guidance; present ROI strategies through 2015 to Board of Directors; implement plans corporate-wide as partner to department heads.
- Guide Support department to retention of 95% recurring support revenue, comprising 50% corporate revenue.
- Manage software revenue recognition controls; implement revenue recognition changes for US/European entity and the Professional Services organization comprising 30% corporate revenue.
- Conduct M&A research and valuation; partner with private equity bankers and M&A firms for company sale.

**2007 to 2012: Director of Finance and Operations**

Directed all facets of finance and corporate operations and assisted in the physical and financial growth of a highly successful software company. Extended the corporate lease and successfully negotiated a new lease location near existing location that saved approximately \$30K each month and expanded the square footage.

- Oversaw critical external financial audits and scheduling and directed the financial and retail industry business strategies that shored up revenue and successfully reduced the cost of customer ads.
- Key decision maker in sales and pricing strategies, go-to-market development and implementation of individual business deals that won increased business and market penetration success.
- Driving leadership force in turnaround of customer losses and growing support revenue during tough economic times and revenue decreases.
- Championed reallocation of expenses, reduced headcount, reallocated resources across departments, utilized all internal resources and moved the VP of Support/Services into a Sales role to minimize staff cutting initiatives and/or duplication of duties and reduction choices.
- Developed IT corporate strategy and managed the IT department that ensured business continuity; oversaw the sales operations process, implemented necessary changes and partnered with bank that maximized fraud security on accounts and directed all finance/accounting functions for the US and European entities.
- Delivered short- and long-term financial planning and business growth projections and analysis on pricing strategies and analyzed detailed budgeting for internal/external usage and made recommendations to improve current financial positioning.
- Fostered corporate banking relations and insurance policies, annual 401(k) audits and maintained stock options and equity reporting, as well as calculated company's valuation for private entity.

**2003 to 2007: Money Corporation, Los Angeles, CA – Controller**

Served as a financial controller for a XXX firm and other diversified entities that included retail AAA franchise—provided accounting for a medical device company with 40% company ownership with annual revenue of \$24MM.

- Managed contracts and key negotiations and reallocated resources within the accounting department and managed all accounting oversight for up to 28 various entities.
- Researched, developed and implemented accounting procedures ensuring GAAP compliance; developed and consolidated monthly financial for 17 related entities and 11 standalone entities that included parte corporation, a construction company, multiple real estate companies, a medical device company, magazine company and a licensed AAA store.
- Completely updated fixed assets that included cost segregation on large tenant improvements and new construction projects, prepared monthly investment schedules of all public/private investments and reconciled 15+ bank/investment accounts.

“James brings both an analytic mind as well as a compassionate heart to his role at Sabey. He understands not all decisions can be made by strictly dollars and cents. He understands the big picture of what the organization requires financially and operationally at the same time understanding the core values of “Do the right thing”, and building “Long term relationships”.

**Jane Smith, Senior Vice  
President Finance, Money  
Corporation**

**EARLY CAREER**

**Consulting, Anytown, MN & Los Angeles, CA - Accounting & Document Control Systems Consultant**

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**EDUCATION / CERTIFICATIONS**

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**Master of Business Administration** | Los Angeles University, Los Angeles, CA

**Bachelors Degree, Finance** | St. James State University, Los Angeles, CA

Timberline Accounting Software – Certified Consultant  
Primavera Document Control Software – Certified Consultant  
Primavera Scheduling Software – Certified Consultant