

NAME

address
city, state, zip

phone
email

FINANCE INDUSTRY EXECUTIVE
(CFO / CEO / COO / EXECUTIVE VP)

Chief Problem Solver

Corporate & Financial Planning • Strategic Partnerships • Financial Controls Securities
Portfolio Management • Financial & Stock Analysis • Banking & Investment Products
Tax Planning & Compliance • Start-up or Turnaround Ventures • Capital Budgeting and P&L

CORE STRENGTHS

<i>ROI Focused Business Planning</i>	High-performance executive with start-ups, small & midsize companies and clients – Catalyst for designing solutions to develop business requirements, and/or fix & modify business problems, and create and implement integrated requirements and best practices. Consistently capture and increase market share
<i>Strategic & Tactical Direction</i>	
<i>Risk Assessments & Loss Management</i>	Spearhead high-growth businesses; exponentially propel production and ROI into the millions of dollars. Define strategic direction, plan business initiatives, and create organizational development and sales solutions, launching start-ups or overturning underperforming operations
<i>Shareholder/Investor & Client Relationship Management</i>	Driven leader with desire to excel as top in industry. Conquered all positions to date, e.g., ranked #1 in a company of 2,500 as a financial specialist after only six months
<i>Communicate precisely to all staff levels</i>	Initiated a mentorship educational program and followed in the footsteps, on-the-job, of successful, high speed CEOs of various firms

PROFESSIONAL EXPERIENCE

Executive Vice President / Regional Branch Manager, Major Bank, Los Angeles, CA

xxxx-xxxx

Promoted to Executive Vice President within two years. Supervise operations for 68 financial specialists and analysts and eight branches. Accountable for P&L and large-scale daily operations. Identify, generate, and grow revenue for new and existing clients. Keen ability to project data, estimate probabilities, and draw conclusions. Lead sales planning meetings.

Analyze operations, formulate and implement difficult recommendations including innovative concepts to streamline processes, greatly improve productivity, and boost bottom-line profits. Develop accurate sales forecasts and operational budgets. Manage multiple, diverse projects. Resolve the most complex problems.

- ❑ Catapulted wallet share of existing customers and improved service measurement scores in all eight branches by 32% in 14 months. Boosted growth and retention doubling goals at the half-year mark.
- ❑ Observe and review operations. Design customer service training programs and lead seminars. Conduct training in 35 branches. Coach and mentor staff in complex compensation plans. Trained personnel during a merger, retaining 99% of customers and maintaining higher than normal customer service ratings.
- ❑ Establish, manage, and nurture a portfolio of affluent relationships. Member of community advancement executive team. Advise community businesses regarding financial requirements (401K programs, debt financing, nego payroll, direct deposits, retirement planning, and expense and balance sheet analysis).
- ❑ Coach clients to define serious financial goals and objectives. Sell, manage, or work with a full-spectrum of complex financial products, credit and capital structures: real estate sales, auto loans, debt consolidation, small business leases, underwriting, loss management, trading, insurance policies, mutual funds, treasury bills, tax consulting, investments, portfolio management, securities, wire transfers, annuities, and others. Personally manage transactions worth \$80M+ monthly.
- ❑ Provide quality administration and regulatory compliance to individuals and corporations. Advisor for NYSE and NASDAQ requirements, tax and fiduciary law, and banking policy.

Sales Manager, Parts R Us, Anaheim, CA

xxxx-xxxx

Recruited by Parts R Us to turnaround underperformance and unmet sales goals, gone unchecked for over three years. Evaluated current operations and cross-trained personnel, meeting sales goal within two months onboard. Developed more commercial business in the first seven months than the entire previous two years – increasing sales by 110%.

- ❑ Created relationships with numerous other auto parts stores and auto dealerships, establishing company as the dominant supplier for parts and accessories. Personally managed supply orders and inventory while guiding the merger of the company.
- ❑ Guided conversion of 11 other stores including systems integration, problems resolution, staffing, and local marketing.

COO/Owner, Mail and More, Fullerton, CA

xxxx-xxxx

Operated six franchise stores and supervised, trained, and evaluated 50+ employees. Trained new franchise owners. Managed staffing and created effective cross-training programs – *so well received that other owners sent their staff for training*. Overarching management for capital budgeting, technology and system integration, accounting, customer service, expense planning, lease contracts, cash and asset management, and business requirements. Performed an extensive industry risk management study.

- ❑ Coordinated marketing for 43 area stores, negotiated marketing contracts with local media, and boosted sales 46% across the board within eight months.
- ❑ Quickly turned around one store producing negative cash flow, in five months, with 150% increase in cash flow. Renegotiated leases and generated a 200% increase in sales in seven months.
- ❑ Lowered the cost-basis of one store in 1.8 years by purchasing equipment for pennies on the dollar from a store going-out-of-business and renegotiating leases – tripling bottom-line profits.
- ❑ Produced positive cash flow through due diligence visits, gaining exposure to key executives in growing companies, and marketing initiatives: direct mailings, market research, and public speaking.

EDUCATION, PROFESSIONAL DEVELOPMENT & CERTIFICATES

- ❑ MBA, University of California, xxxx (GPA: 4.0)
- ❑ Executive Development Program, ABC Corporation, Los Angeles, xxxx (2-year rotational program)
- ❑ College of Financial Planning, CFP and AAMS certificates, xxxx
- ❑ Initiated an executive level mentorship program: Enlisted the coaching and mentoring of CEOs, COOs and Marketing Professionals of various firms and studied their work ethics, management practices, time management, organizational and communications skills. Followed closely in their footsteps and learned directly from successful business executives, xxxx

TECHNOLOGY

- ❑ Proficient use of various financial software including mortgage planning, investments, loans, Roth IRA, retirement, Evergreen Architect, TESS, MS Money, and Excel, Word, and many others

AWARDS

- ❑ *Regional Manager of the Year*, xxxx and xxxx
- ❑ *Branch Manager of the Year*, xxxx, xxxx
- ❑ *Sales Manager of the Year*, xxxx-xxxx consistently