

CHIEF FINANCIAL OFFICER ■ OPERATIONS & SYSTEMS

FINANCIAL TRANSFORMATION STRATEGIST ■ FINANCIAL SYSTEM AUTOMATION EXPERT

PROFESSIONAL ATTRIBUTES ■ SUMMARIZED CONTRIBUTIONS ■ EXECUTIVE EXPERTISE

- **Proactive partner** viewed as a trusted, strategic member of Business Line Leadership Team.
- **Top performer** who consistently exceeds projected goals and objectives.
- **Collaborate** across diverse business platforms to drive consensus and produce cost savings.
- **Encompass high level of professional acumen** based on insights and observations drawn from experience and intuitive, sound approach to decision-making.
- **Foster development** and comprehension of new programs.
- **Pilot financial accountability** in Application Development Management.
- **Spearheaded development** of IT Project Accounting and Transparency System.
- **Generated** notable improvements in proprietary consolidation systems and processes.
- **Fixed assets process owner** for SAP-ECC common financial platform implementation.
- **Effectively** directed multimillion-dollar financial applications to successful completion.
- **Improved** business alignment at tactical/strategic levels, yielding close partnerships, transparency, and ownership.

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| <ul style="list-style-type: none"> ▪ Financial Transformation & System Automation ▪ Project Accounting/Cost of Ownership & Transparency Reporting ▪ Relationship Cultivation & Management ▪ C-Level & Client Interfacing/Reporting & Presentation ▪ Talent Recruitment/Hiring/Leadership/Management & Mentoring | <ul style="list-style-type: none"> ▪ Process Re-Engineering ▪ Expense Control ■ Financial Analysis ▪ Strategic Planning/Budgeting & Forecasting ▪ IT Finance – Accounting for Software Development 98.1 |
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MARQUEE ACHIEVEMENTS *over* HISTORY of CAREER

JACKSON GLOBAL GROUP ■ 1981 – 2013

CHIEF FINANCIAL OFFICER (CFO) OPERATION & SYSTEMS ■ JACKSON GLOBAL P&C ■ 2007 – 2013

CONTROLLER & VICE PRESIDENT ■ JACKSON GLOBAL REALTY CORP. ■ 1985 – 2007

CONTROLLER & VICE PRESIDENT ■ JACKSON GLOBAL TECHNOLOGIES INC. ■ 1981 – 2007

- **Achieved continual career progression to roles that included Controller/Vice President – Jackson Global Technologies/American International Realty Corp (1981-2007) and CFO of O&S – Jackson Global P&C.**
- **Realized positive adjustment in \$10+ million asset base** through extensive review of EDP Software Capitalization compliance with SOP 98.1.
- Succeeded in **providing 100% transparency** of allocated cost for profit center and division level, and amortized prior capitalized costs with details for both operating and capital development expenditures via facilitating development/deployment of automated FIT – Financial Information Transparency System.
- **Decreased month-end processing time by 95%** by migrating project accounting to FIT.
- **Reduced indirect charges and improved financial transparency to business units by \$500,000 +/- per month for Claims and approximately \$1.8 million per month for UW.**
- **Moderated distributed expenses by 41% and achieved Jackson Global utility cost-savings of \$750,000+.**
- **Minimized required time to transfer information to decision makers by 30%**, having rolled out proprietary program instructing one-stop shopping for financial plan and to support financial business strategy.
- **Contracted** accounts receivable balance for items exceeding 90 days **to less than 5% (a 95% reduction).**
- **Generated 25% improvement** in accountability, having changed O&S to a direct charge for all functions.
- **Curtailed fixed compensation costs by \$120,000 per annum** as a result of automated renovation funding that **expedited process by more than 75%.**
- **Magnified cash flow 25% +/-** through coordinated consolidations of CAD (Computer Aid Drawing) monthly rent-roll billing system employed to improve efficiency and accuracy.
- **Procured total cost savings of \$3.0+ million** in HSM file clean up, SAN storage, batch turning, network clean up, and billing discrepancies, **surpassing imposed goal by 386%.**
- **Diminished BAU general operating expenses (GOE) \$120 million, a 10% reduction from previous year.**
- **Assumed role of Controllership** to direct project, which reconciled general ledger and sub-ledger for GAAP, Statutory, and at a legal entity level **for first time in 40-year history of Jackson Global P&C.**

EXPERIENCE

JACKSON GLOBAL GROUP ■ 1981 – 2013

During three decade-plus tenure, drove the common process of Financial Automation and Transformation achieving success employing project accounting, including converting of numerous general ledgers and sub-ledgers (mainframe and Open Systems) and allocation of Cost of Service Center to profit centers, financial statements, and variance analysis, culminating in advanced functionality to Accountants, Financial Managers, Executive Management, and Casual Department Managers.

Improvements instituted in Financial Management Reporting have enabled software capitalization via incorporation of progressive technology, including utilization of Financial Information Transparency (FIT) System, IBM-Clarity/Cognos, Milliumun, SAP-B1, et al... and the ability to alter the business process to support diverse applications and upgrade overall budgeting, forecasting, and reporting methodologies.

JACKSON GLOBAL P&C – Location ■■■ CHIEF FINANCIAL OFFICER ■ OPERATION & SYSTEMS ■ 2007 – 2013

Spearheaded and administered all finance functions for team of 34 and general operating/capital budget of \$1.8+ billion. Implemented full project accounting solutions that procure transparency for Jackson Global Group's numerous business segments and IT management, which facilitates informed decision making on project prioritization to motivate increased profitability and/or strategic investment initiatives.

- Enhanced communication, strengthened relationships, established rapport, and garnered trust within the finance function and with business partners/external stakeholders via implementation of consolidated O&S domestic template that communicates direct recovery for both operations and systems.
- Provided business units the ability to reconcile their Total IT expenditures for project expenses via appendage to existing FIT Allocation reports yielding Total Cost of Ownership portfolio by application.
- Absorbed financial oversight responsibility for Chartis International O&S and supported strategic initiatives to increase financial transparency.
- Repurposed HO Finance team of four into the regions via collaboration with O&S Executives to drive financial discipline and transparency to the Operations and Systems numbers.
- Launched structured global training program, cross-trained individuals when opportunities were presented, and transitioned appropriate candidates into key positions to promote experience and growth.

JACKSON GLOBAL GROUP TECHNOLOGIES – Location ■■■ CONTROLLER ■ VICE PRESIDENT ■ 1981 - 2007

Directed internal accounting functions with oversight of billing and collection aspects for \$415 million +/- in annual billings for 150 Jackson Global Group affiliates worldwide and 20 external clients. Superintended team of 33.

- Managed \$390 million operating budget, accounts payable, fixed assets, cash management, financial systems automation, and consolidated financial/tax reporting for Jackson Global IT and subsidiaries in India/Malaysia.
- Identified, created, and implemented accounting procedures required to record unique billing/financial transactions in support of division's operations.
- Presided over financial internal audit function for SOX compliance, including supervision of audit program development, internal control evaluation, accounting records/documents examination, audit report review, and implementation of improvements for control deficiencies.
- Organized and supervised technology team responsible for proprietary financial systems software/hardware from inception to implementation.

JACKSON GLOBAL INTERNATIONAL REALTY CORPORATION – Location ■■■ CONTROLLER ■ VICE PRESIDENT ■ 1985 -2007

Led team of seven and internal accounting functions for owner-occupied real estate in NY, NJ, and TX.

- Governed \$47 million operating budget, accounts payable, fixed assets, cash management, financial systems automation, and consolidated financial/tax reporting for AIRC and its subsidiaries.
- Guided administration of New York City Industrial Development Act that entitled Jackson Global to net present value benefit of \$58.8 million over 15 years.
- Implemented Property Tax Management System that automated personal property tax return preparation.

EDUCATION ■ CERTIFICATION

Master of Business Administration (MBA) ■ Finance ■■ New York University ■ Stern School of Business

Bachelor of Arts (BA) ■ Accounting ■■ Fordham University

Certified Public Accountant (CPA) - *Inactive*