

A financial and management executive with successful experience with fast growing, startup and turnaround companies including:

**Strategic planning**  
**Mergers and acquisitions**  
**Capital raising**  
**Systems development and implementation**  
**Cost cutting**

**Certified Public Accountant**  
**Member New York State Bar**

## **EDUCATION**

**J.D.**, Hofstra University School of Law, Hempstead, NY  
**B.B.A.**, cum laude, Hofstra University, Hempstead, NY

## **CAREER EXPERIENCE**

CHIEF FINANCIAL OFFICER, Lake Havasu Unified School District, Lake Havasu City, AZ 9/25-present  
Public School district encompassing eith schools and approximately 5,300 students

- Financial management including financial statements, forecasting, budgeting, cost analysis and cash management
- Supervise staff of 7
- Supervised budgeting process
- Preparation of presentation of financial reports to Governing Board
- Grant Management
- Audit Management
- Maintenance of facilities

DIRECTOR OF FINANCE AND OPERATIONS, St. Johns Country Day School, Orange Park, FL 3/21-9/25  
Not for Profit K-12 Private College Preparatory School

- Financial management including financial statements, forecasting, budgeting, cost analysis and cash management
- Supervised budgeting process
- Preparation of presentation of financial reports to Board of Trustees
- Negotiation and procurement of insurance and employee benefits
- Maintenance of facilities
- Refinancing of long and short term debt
- Assisted in installation of new ERP system (Veracross)

CONSULTANT, American Energy Distribution LP, Dallas, TX 5/10-8/24  
INC 5000 Distributor and Transporter of Petroleum Products, Real Estate Developer and Owner of C-stores and restaurants

- Assisted in negotiation and due diligence of acquisition of 70 gas station/convenience stores with real estate
- Assisted in location and negotiation of debt financing
- Assisted in proposed acquisition of numerous transportation and fuel distribution companies
- Assisted in installation of new ERP system (PDI)

CONSULTANT, Sarona Holdings, Orlando, FL 12/19-3/21  
Owner and developer of hotels

CONSULTANT, Global Financial Partners, Los Angeles, CA  
Provider of healthcare financing

CONSULTANT, Iconfit, San Rafael, CA

Owner and operator of health clubs and apartments

- Assisted in renegotiation of debt financing and the obtaining of numerous PPP loans

CHIEF FINANCIAL OFFICER AND GENERAL COUNSEL, Ionic Brands, Inc. Tacoma, WA 2/18-12/19  
Vancouver Stock Exchange listed manufacturer and distributor of cannabis

- Financial management including financial statements, forecasting, budgeting, cost analysis and cash management
- Instrumental in getting in taking company public
- Assisted in acquisitions of other cannabis companies and growth into new markets
- Assisted in installation of new ERP system (Navision)

INTERIM ACCOUNTING MANAGER, Sourcely LLC, Phoenix, AZ 5/17-2/18  
Startup SAAS, E-commerce and Retail Distributor and Manufacturer of parts for cell phone industry

- Financial management including financial statements, forecasting, budgeting, cost analysis and cash management
- Installed new payroll system
- Drafted Accounting SOP's
- Developed and monitored KPI's
- Drafted new employee handbook

INTERIM CFO, Republic Health Resources, Irving, TX 11/16-4/17  
Nurse Recruitment and Staffing Agency

- Financial management including financial statements, forecasting, budgeting, cost analysis and cash management
- Located and negotiated doubling of debt financing
- Installed new payroll system
- Created and supervised budgeting process
- Reduced past due receivables by 25%
- Assisted in negotiation of numerous government contracts
- Supervised staff of four

CHIEF FINANCIAL OFFICER Core Dental Solutions, Mesa AZ 4/16-11/16  
Multi-location owner and manager of Dental Practices

- Financial management including financial statements, forecasting, budgeting, cost analysis and cash management
- Liaised and supervised outside auditors
- Supervised staff of 8
- Located and negotiated debt financing
- Supervised budgeting process

CHIEF FISCAL OFFICER, Tribute Health Plans, Little Rock, AR 10/14-12/15  
Start Up Health Care Plan

- Created and implemented General Ledger system
- Created and implemented internal controls
- Supervised outside vendors in claims paying, membership verification and services preauthorization
- Prepared and filed statutory reports

GENERAL COUNSEL AND FINANCIAL CONSULTANT, Global Tobacco, Dallas TX 2/14-10/14  
Manufacturer, distributor and retailer of tobacco products and e-cigarettes

- Responsible for all legal issues including trademarks, contract drafting and review and regulatory issues
- Involved in new joint venture with Chinese partner
- Consulted on financial matters including negotiating and reviewing bank financing
- Developed and implemented new cost accounting procedures

CHIEF FINANCIAL OFFICER, Guardian EMS, Columbus TX 5/13-2/14  
Multi-location provider of Medical and Emergency Transportation services

- Financial management including financial statements forecasting, budgeting, cost analysis and cash management
- Implemented new billing system
- Assisted in acquisition of Company
- Negotiated and successfully reached agreement with IRS regarding extensive back payroll taxes

CHIEF FINANCIAL OFFICER/ADMINISTRATOR, Advanced Pain Care/Round Rock Surgery Center, Austin, TX 10/12-5/13  
Multi-location Medical Practice and Outpatient Surgery Center

- Financial management including financial statements forecasting, budgeting, cost analysis and cash management
- Located and negotiated new debt financing
- Negotiated real estate leases for new offices
- Developed and implemented new financial and internal controls

CHIEF FINANCIAL OFFICER, Teragren LLC, Bainbridge Island, WA 11/04-2/10  
Inc 5000 Manufacturer and Distributor of Green Building Products

- Financial management including financial statements forecasting, budgeting, cost analysis and cash management
- Located and negotiated debt financing
- Helped Company triple revenues
- Successfully implemented new ERP system (Navision)

**NOT FOR PROFIT EXPERIENCE**

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| <u>Treasurer</u> , Friends of the St. Augustine Amp, St. Augustine FL<br>Provider of Art and Music camps for children                                | 2024-present |
| <u>Founder and Treasurer</u> , Pathways to Equity, Ithaca, NY<br>Publisher of Ithaca Times and other community newspapers                            | 2024-present |
| <u>Founder and Treasurer</u> , Bold City Jazz Society, Jacksonville, FL<br>Promoting Jazz to the community and providing scholarships to students    | 2024-present |
| <u>Treasurer</u> , PossaBilities Plus, Atlantic Beach, FL<br>Provider of resources to autistic children and adults                                   | 2022-present |
| <u>Treasurer</u> , The Healthcare Navigation Project,<br>Education to people to help to navigate healthcare system                                   | 2022-present |
| <u>Treasurer</u> , Inside Health Institute, Bothell, WA<br>Health center serving marginalized populations                                            | 2020-present |
| <u>Board Member</u> , Ava's Way<br>Provider of online courses to Parents with Special Needs Children                                                 | 2024-present |
| <u>Treasurer</u> , Ars Minerva, San Francisco, CA<br>Producer of baroque operas                                                                      | 2016-present |
| <u>Treasurer</u> , Carco Theater, Renton, WA<br>Theater producing and presenting shows to public                                                     | 2018-present |
| <u>Treasurer</u> , Troops to Firefighters, Atlanta, GA<br>Provider of education services to retired military members to train to be first responders | 2018-present |
| <u>Treasurer</u> , Bee Girl, Ashland, OR<br>Education and research into Bees                                                                         | 2020-present |
| <u>Board Member</u> , Man2Man, Oakland, CA<br>Provider of education services to marginalized men                                                     | 2020-present |
| <u>Board Member</u> , North Florida Folk Network, Jacksonville, FL<br>Promoting folk music to the community                                          | 2024-2025    |
| <u>Tax and Financial Advisor</u> , Trek Medics, Hartford, CT<br>Developer of software and provider of EMT services in developing countries           | 2015-present |
| <u>Financial Advisor</u> , Oakland Conservancy, Oakland, CA<br>Not for profit provider of music education to marginalized children                   | 2020-present |
| <u>Financial Advisor</u> , Open Heart Leaders, San Diego, CA<br>Provider of mental health services to marginalized people                            | 2020-present |
| <u>Treasurer</u> , Jacksonville Jazz Society, Jacksonville, FL<br>Promoting Jazz to the community and providing scholarships to students             | 2021-2024    |
| <u>Consulting CFO</u> , Austin Discovery School, Austin TX<br>Charter School                                                                         | 2020-2021    |
| <u>Treasurer</u> , Create Academy, Phoenix AZ<br>Title I Charter School                                                                              | 2019-2021    |
| <u>Treasurer</u> , Cedar River Montessori School, Renton, WA<br>Montessori School                                                                    | 2019-2020    |
| <u>Treasurer</u> , Cancer Response Team, Phoenix, AZ<br>Provider of alternative health resources to children                                         | 2017-2020    |