

A refined manager experienced in Strategy, Finance, Business Development, and Accounting. A proven business leader in the turnaround of distressed companies and development of start-up ventures. Experienced in the healthcare, construction, engineering, property development, banking, manufacturing, services, and non-profit industries while assuming numerous roles within the organizations.

### **PROFESSIONAL EXPERIENCE**

#### **CLEAR ADVANTAGE COLLAR, INC.**

**2008 – Present**

##### **Chief Executive Officer**

- **Entrepreneurship** – Developed the initial offering prospectus including business plan, escrow agreements, and stock subscription agreement for a start-up company in the healthcare industry. Structured all required business agreements, licenses, corporate filings, and employment contracts. Managed relationships with manufacturers, distributors, and shareholders.
- **Capital Financing** – Presented the business plan and initial offering of \$2MM to build an investment group consisting of angel investors, investment bankers, venture capital groups, and individual investors. Ensured the efficient capital was secured for operations to begin.
- **Business Development** – Managed relationships with all manufacturers, distributors, and corporate shareholders.
- **Marketing** – Developed, distributed, and compiled marketing surveys, interviews, and advertising materials to launch the Clear Collar. Unveiled the product to the medical professional community at the EMS Expos across the US.

#### **NEXAGY, INC**

**2008 – Present**

##### **Business Strategy Consultant**

- **Marketing** – Developed, distributed, and compiled marketing surveys, interviews, and advertising materials to launch a medical device to the healthcare industry.
- **Strategic Development** – Developed the long term strategy and organizational structure of client administrative, operational, and client service segments. Provided organizational behavior coaching throughout the transition of a new Executive Director.
- **Asset Management** – Structured the acquisition of fixed assets from a large commercial retailer. Implemented the recording system for all assets to FAS.
- **System Implementation** – Designed and implemented procedures for the conversion of the financial and accounting records from QuickBooks to Financial Edge.
- **Process Improvement** – Established client budgets and cash requirements needed to secure the cash flows of the organization. Redeveloped and transitioned new accounting procedures.

#### **INTELLIGENT DESIGN ENGINEERING, P.C.**

**2007 – Present**

##### **Co-Founder and Chief Financial Officer**

- **Entrepreneurship** – Secured financing to provide the capital needs of the structural engineering firm. Structured all legal requirements, federal/state regulations, tax practices, and corporate guidelines for the creation of the start-up company. Structured all required business agreements, licenses, corporate filings, and employment contracts.
- **Business Development** – Developed the Human Resource department's capability to handle benefits, insurance, and retirement accounts. Coached the owners on organizational behavior and provided business training for successful growth. Designed and implemented the firm's marketing strategy.
- **Decision Support** – Created all cash flow, financing, and accounts payable/receivable procedures in order to establish an accounting department.

**PROFESSIONAL EXPERIENCE (cont.)****VERNA AND ASSOCIATES, INC.****2001 – 2007****Chief Financial Officer**

- **Controllership** – Managed all financing and accounting responsibilities for the *development of a \$45MM* condominium project.
- **Manage Diverse Business Entities** – Responsible for planning, forecasting, and variance analysis for several business entities from various industries including construction, engineering, real estate development, and property management.
- **Strategic Development** – Implemented a strategy that *increased gross income 300%* within 4 years. *Reduced expenses \$280,000 (37%)* for the parent company within the first 9 months of employment.

**BANK OF AMERICA****1998 – 2001****Global Corporate Investment Banking – Syndication Support** (February 2001 – October 2001)**Finance Management Associate Program (MAP)** (June 1998 – February 2001)

Completed a three year rotational program for the training of future leaders and financial managers.

**COMMUNITY DEVELOPMENT****SOCRATES ACADEMY****Jun 2008 – Oct 2010****Board of Directors**

- **Project Management** – Researched and analyzed the future land development for the charter school's expansion.
- **Fundraising** – Increased parent participation in fundraising by 500% and donations by over 300% by developing and implementing the \$10 to 100% Campaign.
- **Strategic Development and System Implementation** – Managed the IT Committee to design and implement the new technology systems.

**EDUCATION & CERTIFICATIONS****AACSB International Bridge Program (Jun. 2013)**

University of Southern California – Professionally Qualified for University Faculty

**Masters of Business Administration (Dec. 2008)**

Queens University – The McColl School of Business, AACSB Accredited

**Bachelor of Science, Accounting (May 1998)****Bachelor of Science, Management Information Systems (May 1998)****Bachelor of Arts, English (May 1998)**

University of North Carolina at Charlotte – The Belk College of Business, AACSB Accredited

**North Carolina Certified Public Accountant****ACCOMPLISHMENTS**

- Charlotte Business Journal 2012 Top 40 Under 40
- Business Leader 2010 Top 50 Charlotte Entrepreneurs
- David C. Stephens Spirit of Entrepreneurship Award  
McColl School of Business - 1<sup>st</sup> Place for "The Clear Collar" – Business Plan Competition

**ACTIVITIES AND PROJECTS**

- Coach Junior Basketball League for YMCA – Morrison Family Branch. (3 years)
- Den Leader for Boys Scouts of America – Pack 8 (4 years)