

7718 Lachlan Drive
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Management Consulting Experience Detailed, most current to oldest

(Consulting Engagements,
Sarbanes-Oxley *[unless
otherwise specified]*)

In the capacity as **Senior Manager / Director**, I worked for multiple corporate entities (i.e. consulting engagements) from 2003 until 2009 and from 2014 until 2023, on behalf of three prestigious consulting firms specializing in finance and accounting, internal audit, process reengineering, policy documentation, and Sarbanes-Oxley internal controls reviews.

- ▶ **New Era Technologies (www.neweratech.com)** – **technology** – a billion-dollar revenue company with global operations and almost 5,000 employees providing audio, video and IT technology solutions and ongoing management to many of the largest companies in the world. Worked in FL. *[interim Financial Controller partnering with the Global Controller and CFO to build out and deliver an accounting and financial reporting shared services team, not SOX]*
- ▶ **AEGON Asset Management (Transamerica) (www.aegonam.com)** is a subsidiary of **AEGON N.V. (www.aegon.com)** – **financial services** – a large Dutch insurance and financial services conglomerate with global operations head-quartered in The Hague. Worked in FL. *[streamlined accounting system structure and automated through bots and otherwise to minimize manual journal entries with the goal of shortening the monthly reporting cycle and minimizing intervention and errors, not SOX]*
- ▶ **Barings Securities (www.barings.com)** – **financial services** – a \$350B global investment manager in the public and private credit, real estate and equity markets. Worked in FL. *[institutional client lifecycle analysis and private equity real estate process reengineering from prospective opportunity through onboarding and ultimately liquidation, not SOX]*
- ▶ **Welbilt Inc (www.welbilt.com)** – **manufacturing** – formerly Manitowoc Foodservice, a global company focused on the design, manufacture, and supply of food and beverage equipment. Worked in KY and CO. *[co-sourced internal audit, pre-audit, and post-acquisition integration. Performed year-end balance sheet audit and review, and a process analysis on manufacturing and warehousing, beginning with the sales order through shipping, including acquisition of raw materials, work in process, standard costing, and inventory, not SOX]*
- ▶ **Syneos Health (www.syneoshealth.com)** – **pharmaceutical / healthcare** – formerly inVentiv Health, a global healthcare leader providing out-sourced or co-sourced services that span pharmaceutical product development through delivery, achieved through customized clinical trials, sales, marketing, and communications solutions under four core business segments: Clinical, Communications, Commercial, and Patient Outcomes. Worked in NJ, OH, and TX.
- ▶ **Verint (www.verint.com)** – **technology** – a top 30 US enterprise software company that is a leading provider of actionable intelligence solutions for workforce optimization, IP video, communications interception, and public safety. Worked in Atlanta, GA.
- ▶ **MissionSquare Retirement CMA-Retirement Corporation (www.missionsq.org)** – **financial services** – formerly ICMA-Retirement Corporation, an independent not-for-profit financial services organization that manages and administers retirement plans solely for the private sector, currently more than 1.5M participant accounts in more than 9,500 plans. Worked in Washington, DC. *[co-sourced internal audit, not SOX]*

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- ▶ **CA Technologies** a subsidiary of Broadcom Inc. (www.broadcom.com) – **technology** – one of the world's largest B2B software developers operating in 40 countries with more than 11,000 employees and revenues in excess of \$4B. Worked in New York, NY.
- ▶ **Stolt-Nielsen Transportation Group** (www.stolt-nielsen.com) – **shipping / transportation** – one of the world's leading providers of globally integrated transportation services for bulk-liquid logistics, distribution and high-quality aquaculture products, operating in 30 countries and with more than 6,500 employees. Worked in The Netherlands, Spain, Brazil (Sao Paulo, Rio de Janeiro, Santos, and Salvador), TX and CT.
- ▶ **Cendant** – **hospitality** – currently known as Avis Budget Group (www.avisbudgetgroup.com), was the world's foremost provider of travel and real estate services, having assets of more than \$40B and revenues in excess of \$20B. They were one of the world's largest hotel franchisors (Ramada, Howard Johnson, Days Inn, Super 8, Travelodge, Knights Inn, Wingate Inn, etc.); the largest vacation ownership organization; one of the world's largest car rental operators (Avis and Budget); and the world's largest real estate brokerage franchisor (ERA, Coldwell Banker and Century 21, etc.), prior to spinoffs into 4 separate companies. Worked in NJ.
- ▶ **Technology Research Corp** (www.tecrescorp.com) – **manufacturing** – internationally recognized as a leader in the design, manufacture, and marketing of portable electrical safety products operating in the U.S., Honduras and Asia with revenues of \$40M. Worked in FL.
- ▶ **QC** (www.qualitycarriersinc.com) – **shipping / transportation** – a subsidiary of CSX Corp and formerly QDI, the largest bulk tank trucking firm in North America with revenues of \$400M, services the top 100 chemical producers in the world with U.S. operations. Worked in FL.
- ▶ **Dycom Industries, Inc.** (www.dycomind.com) – **telecommunications** – an industry-leading cable and telecom construction and servicing firm with revenues of \$3B, 14,000 employees and having more than 35 subsidiaries in 21 states. Worked in FL and 8 other subsidiary locations.
- ▶ **MetLife** (www.metlife.com) – **financial services** – a perennial top 50 Fortune 500 insurance and financial services firm with assets of \$600M and revenues of \$72B. Worked in FL.

**AEGON Asset
Management
(Transamerica)**
Experience Detailed

- ▶ As **Managing Director** and **Director of Global Business Development** from 2000-2002, I lived and worked in Luxembourg as an expat, leading the development of an offshore business for AEGON, called **Transamerica International**. From Luxembourg, I worked locally with AEGON sister companies and distributors in Edinburgh, London, Dublin, The Hague, Madrid, Milan, Geneva, Zurich, Hong Kong, and various locations in Canada.
- ▶ As **Interim Controller**, from 1999-2000, I represented AEGON Asset Management's interests in an international joint venture, participating in Audit Committee and Board of Director's meetings, among other daily responsibilities.