Consulting Engagement Addendum

October 2026

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In the capacity of Senior Manager / Director, I delivered consulting engagements for the corporate entities below from 2003 to 2009 and from 2014 to 2023, and again in 2026, through five channels: Protiviti and Robert Half Management Resources (Robert Half), RGP, Control Solutions, and Taylor White – firms specializing in finance and accounting, internal audit, process reengineering, policy documentation, and Sarbanes-Oxley internal controls reviews. Other engagements from 2024 forward are delivered directly through ApexVista Asset Management LLC. Engagements are Sarbanes-Oxley unless otherwise noted.

Current and recent engagements (2026)

- **MyConnectivity GIE (myconnectivity.lu) – Luxembourg –** public-interest organization. Budget governance design: a budget charter defining how budgets are set, approved, and changed, connecting the Luxembourg standard chart of accounts with mission-based budget envelopes, plus the annual operating tools. Delivered remotely. CEO recommendation (LinkedIn, Oct 2026): *"More than once, he identified where a decision would create a problem later, and proposed how to handle it now."* [not SOX]
- **Community Foundation of Tampa Bay (cftampabay.org) – Tampa, FL –** interim Controller (contract via Taylor White). Investment accounting close on the newly implemented Foundant CommunitySuite platform; approximately 60 monthly reconciliations; built an interactive scenario tool for the CFO's annual board forecast presentation (live what-ifs answered as updating visuals, driven directly from the existing Excel forecast model with no rekeying) and a reusable Power Query reporting workbook, both transitioned to the client. CFO recommendation (LinkedIn, Oct 2026): *"He builds things that outlast his engagement… If you need a senior finance professional who can step into an unfamiliar environment and deliver from the first week, I recommend Alan without hesitation."* [not SOX]
- **European professional-services firm (confidential) – 2026–2027 –** U.S. market-entry practice design: entity activation, service and delivery design, and CPA sourcing. [not SOX]

Consulting engagements (2003–2009 and 2014–2023), most recent first

- **New Era Technology (neweratech.com) – technology –** $1B+ revenue company with global operations and almost 5,000 employees providing audio, video, and IT technology solutions 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 (aegonam.com) – financial services –** subsidiary of AEGON N.V., a large Dutch insurance and financial services conglomerate headquartered in The Hague. Worked in FL. [streamlined the accounting system structure and automated journal entries, including bots, to shorten the monthly reporting cycle and reduce errors; not SOX]
- **Barings Securities (barings.com) – financial services –** $350B global investment manager in 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 to liquidation; not SOX]

- **Welbilt Inc (welbilt.com) – manufacturing –** formerly Manitowoc Foodservice, a global designer, manufacturer, and supplier of food and beverage equipment. Worked in KY and CO. [co-sourced internal audit, pre-audit, and post-acquisition integration; year-end balance sheet audit and review; manufacturing and warehousing process analysis from sales order through shipping, including raw materials, WIP, standard costing, and inventory; not SOX]
- **Syneos Health (syneoshealth.com) – pharmaceutical / healthcare –** formerly inVentiv Health, a global provider of outsourced clinical development and commercialization services. Worked in NJ, OH, and TX.
- **Verint (verint.com) – technology –** top-30 U.S. enterprise software company in actionable intelligence: workforce optimization, IP video, communications interception, and public safety. Worked in Atlanta, GA.
- **MissionSquare Retirement (missionsq.org) – financial services –** formerly ICMA-RC, an independent not-for-profit managing retirement plans with more than 1.5M participant accounts across 9,500+ plans. Worked in Washington, DC. [co-sourced internal audit; not SOX]
- **CA Technologies, a subsidiary of Broadcom Inc. (broadcom.com) – technology –** one of the world's largest B2B software developers, operating in 40 countries with more than 11,000 employees and $4B+ revenues. Worked in New York, NY.
- **Stolt-Nielsen Transportation Group (stolt-nielsen.com) – shipping / transportation –** a world-leading provider of integrated bulk-liquid logistics, operating in 30 countries with more than 6,500 employees. Worked in the Netherlands, Spain, Brazil (São Paulo, Rio de Janeiro, Santos, and Salvador), TX, and CT.
- **Cendant – hospitality –** now Avis Budget Group; at the time the world's foremost provider of travel and real estate services ($40B+ assets, $20B+ revenues): hotel franchising, vacation ownership, Avis and Budget car rental, and real estate brokerage franchising, prior to its spin-off into four companies. Worked in NJ.
- **Technology Research Corp – manufacturing –** internationally recognized leader in portable electrical safety products, operating in the U.S., Honduras, and Asia with $40M revenues. Worked in FL.
- **Quality Carriers (qualitycarriersinc.com) – shipping / transportation –** subsidiary of CSX Corp, the largest bulk tank trucking firm in North America ($400M revenues), serving the world's top 100 chemical producers. Worked in FL.
- **Dycom Industries (dycomind.com) – telecommunications –** industry-leading cable and telecom construction and servicing firm: $3B revenues, 14,000 employees, 35+ subsidiaries in 21 states. Worked in FL and 8 subsidiary locations.
- **MetLife (metlife.com) – financial services –** perennial top-50 Fortune 500 insurance and financial services firm with $72B revenues. Worked in FL.

AEGON Asset Management (Transamerica) – additional detail

- As Interim Controller (1999–2000), represented AEGON Asset Management's interests in an international joint venture, participating in Audit Committee and Board of Directors meetings; developed a monthly close process consolidating results from 5 countries.