

Profile

After 15+ years in both Corporate and Entrepreneurial Finance, I am returning “home” to the Pacific Northwest and my family. I have been at Whole Foods Market, an Amazon sub for 2.5 years. As the company transitioned away from holding Finance in the regions (where I oversaw and owned the financial results for 2 regions) I have moved into Global Finance/Operational Finance Director where I am responsible for labor management and performance of all six geographies (650 stores) 20% of sales === \$4B annual expense. My expertise is in developing and executing strategy to influence Financial Results through Operational Finance. My consulting background exposed me to many industries including Retail, E-Commerce, and Entertainment. My goal is always to make an impact. Through collaboration with partners I move mountains, whether through process reiteration, operational restructure, shrink/spoilage reduction, labor management or other margin and ‘controllable’ expense levers. I have years of experience managing a team and my primary objective is always to achieve 110% of any goal.

Microsoft Office Suite Skills: Expert. ERP platforms: Workday, FPM, adaptive BPC, Control, Legend, ISIS, Concur, Oracle and Hyperion. BI tools: Tableau, Insights, Everclear, Power BI, Cognos, Alltryx

Experience

Whole Foods Market - (Corporate/Operational Finance) March 2020-present
Director Of Finance (9/22), Principle Finance Partner (3/20), Multiple Regions

- Labor Management and Planning, Total Company (multiple channels: In-Store + EComm)
- Strategic Initiative development, tracking, actualization
- Annual Budget + Quarterly Reforecasts for Labor, OPEX, G&A
- ROIC and CAPEX Process development, tracking, actualization
- Global Cost Opportunity Working Group with Global Exec VP, success of +\$27M in efficiencies to date
- Operational Region Close Process development
- As Finance Partner: Responsible for Financial Performance of multiple regions totaling ~\$5B in annual sales, effective CFO of both regions. Weekly/Monthly/Quarterly Business Reviews with Regions and with Global E-Team to discuss results, drivers, risks and opportunities. Execute action plans with region to drive improvement at regional/team/store level. Developed Sales Driving Initiative Process that drove turnaround to Revenue contraction in NorCal, Coordinated restructure of Hawaii costs and pricing to cover heightened COGS and return profitability to subset of stores, Navigated Amazon Pricing investment in California to retain profitability despite lowered retails. Opened 11 stores, all open >1yr exceeded EBITDA Forecast

Polaris Industries/Transamerican Auto Parts- August 2017-Mar 2020
FP&A Finance Manager, (Total Company: TAP arm) – Compton, CA

- 7 Direct Reports within FP&A, Hiring oversight prior to C-Suite for FP&A, collaboration with Controller
- Restructured Marketing Function and Processes, implemented company controls, consolidated department, support strategy discussion.
- Developed Acquisition model, ROIC model, CAPEX Tracking Process
- Developed new processes for Financial Close, Budget/Forecast cycles
- As Lead Sr Financial Analyst (promoted in 1 yr): Responsible for Financial performance of B2C Channel (\$0.6B 2019, 95 stores, 13 regions, 3 zones)– Executive Reviews, Weekly Business Reviews to CFO/CEO/Directors of TAP. Quarterly Business Reviews to parent company Executive team

Belkin Intl. (Corporate/Treasury/FP&A)
August 2016-Nov 2016

- Financial Consultant/Interim FP&A Manager – Playa Del Rey, CA
- Hired short term to help with Fiscal Year end budgeting and increased work-load. Declined offer to remain
- Daily Cash Flow Forecast, Reconciliation, Reporting and Analysis
- Worldwide Cash Flow Forecast Consolidation for all International Divisions, US lead
- Cash Receipts and Unapplied Reporting and Analysis, streamline Accounts Receivable processes
- Daily and Weekly Budgeting of Accounts Payable Disbursement, Positive Pay Oversight, Analysis, Strategy
- Budgeting, FP&A Support – built Department level FY17 Budgets for all 27 Departments
- Ad-Hoc Financial Modeling, Reporting and Analysis, Strategy

Education

University of Southern California Marshall School of Business

Master of Business Administration – Emphasis Finance/Business Law

Ranking: Top 1% 3.929 GPA Final Ranking: #2, Deans List

Pepperdine University

Bachelor of Arts

Honors: Magna Cum Laude 3.76 GPA

Additional Certification: CFA, Level 2

Additional Experience

Morgan Stanley Private Wealth Management May 2009-Sept 2011	Student Investment Fund, University of Southern California March 2010-March 2011	University of Southern California, Finance & Economics Department Jan 2010-Dec 2010
Financial Advisor Associate & Analyst, The Wilshire Group)- Beverly Hills, CA (\$iB in Assets)	Fund Manager, Trojan Equity Fund 16 MBA students chosen to manage university endowment for a one year tenure.	Graduate Teacher's Assistant – 2 separate classes: Professors Lloyd Levitin and J. Kim Dietrich. Corporate finance, mergers and acquisitions.

Consulting

The Circle Ltd. and Pocketwatch Productions (Production Arm)

September 2011-Present

- VP Financial Strategy and CFO – Tacoma, WA
- Strategy and Implementation of all Corporate Finance, Corporate Structure, Financing, Budgeting, Marketing, Concept Development, and Branding for the company and its productions
- Oversee Pitch Packages, Deal Memos, ROI/ROIC Analysis, Books, Accounts, and Strategy with regards to Financing and Distribution
- Perform Monthly, Quarterly, Annual Reports including Revenue and Disbursements, Annual Budget, Quarterly Forecast, P&L, Balance Sheet, Cash Flow Statements, and CPA and Payroll Relationships
- Variance Analysis and Special Projects, Board Presentations, Financial Presentations, Capital Expenditure Analysis, New Business Opportunities, & Acquisition Analysis
- Identification of opportunities for improvement and growth within Revenue, Cost of Sales/Margin, Expenses and Capital Expenditures
- Monitor and Review Performance Indicators, highlighting Trends and analyzing causes of unexpected Variance
- Development of Film Budgets, Financing Pitches, Decisions, Contracts, Line Production, and Investor Relations
- First Comic book "KillBox"– first 2 series released (8 issues), sold out at distributor level in first 3 days. Next 4 issues written and in production. Trade paperback of Series 1 (first 4 issues bundled) released as graphic novel; Publisher American Gothic Press in conjunction with Famous Monsters of Filmland, Film/TV deals in negotiations

Kayah Productions

Jan. 2007-July 2009

Co-Founder, CEO/CFO - Beverly Hills, CA

- Established Company to Create and Produce Material according to my own Moral and Ethical code. Responsible for all Accounting Prep, Financial Modeling, and Budgeting Developed the Business Model and a Market Analysis
- Manage Projects from Conception through Development Planning and Scheduling; Supervise Writing Process; Pitch and Present Concepts to Potential Investors.
- Sold company in 2009, was merged with another production company