

## EXECUTIVE SUMMARY

Highly respected Chief Financial Officer and cross-functional leader who consistently delivers outstanding growth and profit results in varied geographies and within complex industries. Leverage combination of deep financial expertise, global operational insight and talent development skill to build teams possessing a passion for excellence with broad decision-support and project execution capabilities. Lead transformational business process design efforts. Merger and acquisition experience includes technical and cultural aspects. Valued enterprise strategic thinker, committed financial business partner and trusted governance board advisor.

## PROFESSIONAL COMPETENCIES

- CFO/Business & Operations Leader
- Treasury/Investment Management
- Revenue Growth/Profit Delivery
- Strategic Planning/Project Management
- Global/Cross-Industry FP&A
- Controllership/Cost Accounting
- M&A/Due Diligence/Integration
- Talent Development/Org Design
- Internal Audit/Process Improvement
- Employee Engagement/Coaching
- Legal/Contract Review
- Board Communications/Collaboration

## SELECTED ACCOMPLISHMENTS

- Primary executive leader for AAA Arizona annual budgeting and monthly operations review processes. Led organization to consistently deliver on commitments and achieve outstanding long-term growth.
  - Results over 11 year period: Membership growth from 697,000 to 917,000 (2.5% CAGR); Revenue growth from \$61M to \$117M (6.1% CAGR); Equity growth from \$25M to \$59M (8.1% CAGR).
- Consolidated AAA Arizona investment management from three advisors to one using a three-stage RFP and analysis process. Simplified reporting and performance review, including communication with internal management and board of directors.
  - Improved expected portfolio return by 0.5 point (from 6.0% to 6.5%) without increasing risk. Combined reserve and pension portfolio has grown to over \$100M.
- Advocated for merger with AAA Northern California, Nevada and Utah (AAA NCNU) to streamline governance and cost. Merger created organization with \$800M revenue serving 5.6 million members. Led due diligence including review of financial/HR/legal matters; achieved key deal outcomes (Arizona-based call center, guarantee of pension benefit for fixed period).
  - As primary communicator with Arizona board, kept them apprised of progress, critical issues and decision points resulting in deal approval on-schedule effective June 1, 2016.
- Led actions to respond to Finance/IT portions of AAA Arizona employee engagement survey on the need for improved communication and career development. Collaborated with direct staff leaders and HR/training on performance coaching, stronger 2-way communication and leadership changes. Committed that each employee would have an annual career discussion.
  - Survey participation rose from 92% to 97% and engagement improved from 81% to 91% in 18 months.
- Improved Honeywell Process Solutions pre-award risk assessment and mitigation by developing/executing Global Approval Process; also drove global project review process resulting in earlier visibility to and mitigation of cost and schedule issues.
  - Impact of efforts resulted in significant reduction in unexpected project cost adjustments and net per-quarter savings of \$1M.
- Established corporate-level forecasting and reporting for Aerospace segment (representing 40% of company revenue) in months immediately following Honeywell/AlliedSignal merger. Built relationships with SBU CFOs and FP&A leaders to ensure timely understanding of data and key assumptions, and develop summary commentary suitable for senior executives and investors.
  - Quickly delivered valued insight on combined Aerospace segment for corporate CFO and investor relations team, which was essential as the merger's strategic rationale largely centered on the combined aerospace avionics business.

## EXPERIENCE

### **AAA ARIZONA, INC. – Phoenix, AZ**

**2006-Present**

*\$125M auto club with 800+ employees providing membership, roadside assistance, insurance, travel, auto repair, financial services and discounts to more than 900,000 members throughout Arizona.*

### Chief Financial Officer

Report to President & CEO as a member of the senior executive team; manage overall team of 50+. Led agenda and content development for quarterly Board of Director and Committee meetings. Member of Retirement Committee comprised of CEO, CAO and CFO. Strategic functional leader for Financial Planning & Analysis, Treasury & Risk Management, Controller, Procurement, Project Management, Information Technology, Internal Audit, Legal and Compliance.

**AAA Arizona Chief Financial Officer (continued)**

- Drove refresh of leadership competency model to better ground in current culture and include key behaviors to accelerate growth, profitability and innovation.
  - Revised leadership competency model served as the basis for the club's first leadership 360 degree feedback process - with corresponding action planning – to improve self-awareness, communication, coaching and results.

**Additional executive leadership responsibility while serving as Chief Financial Officer:**Strategic Planning (2008 – 2010)

- Initiated change in strategic planning framework to utilize balanced scorecard methodology which clarified long-term goals, required capabilities and identified execution priorities/objectives. Feedback from board and executive team was extremely positive and led to substantial refresh of overall mission, vision and values statements.
  - Strategies developed, along with budget and monthly operations review processes, were key to delivery of above results.

Membership Sales & Service (2011 – 2014)

- Partnered with Marketing to gain board support to implement multi-year strategic change in membership pricing to reduce dependence on promotional pricing and strengthen focus on service quality and product penetration to improve retention.
  - Maintained 2.1% CAGR during period of change, including absorbing initial unfavorable impact of lower acquisition. Retention improved 1.6 points to 87.9% and household automatic renewal penetration improved by 20 points to 47.1%.

Business Development (2015 – 2016)**HONEYWELL INTERNATIONAL INC.****1999-2006**

*\$31B global technology company with 118,000 employees providing customer solutions in the aerospace, automation and control, transportation systems and specialty materials segments.*

**Automation & Control Solutions/Honeywell Process Solutions - Phoenix, AZ**Director, Global Financial Planning & Analysis (2004 – 2006)

Reported to Chief Financial Officer and led 11-person finance team providing planning, forecasting and results analysis for \$2B business comprised of Projects/Service units in Americas, EMEA & Asia Pacific as well as a Global Products unit. Accountable for Annual Operating Plan, Strategic Plan, Monthly Operating Reviews, and ongoing performance analysis.

- Continuously improved monthly operating reviews to drive greater consistency in analysis and reduced cycle time for preparation by streamlining and standardizing requirements
- Identified opportunities to improve Automation & Control Solutions processes and systems while serving as member of cross-business team focused on Finance Functional Excellence

Finance Director, Global Projects (2001 – 2004)

Reported to Chief Financial Officer and led 19-person finance team providing business analysis and support for \$1B project delivery line of business. Accountable for revenue and margin forecast and results, cost management and controls. Direct staff included leaders in Americas, EMEA & Asia Pacific.

**Corporate Headquarters - Morristown, NJ**Director, Business Analysis & Planning (1999 – 2001)

Reported to Vice President of Business Analysis and Planning. Led corporate-level forecasting and analysis for \$10B Aerospace segment following Honeywell/AlliedSignal merger. Provided CEO/COO/CFO with analysis and recommendations for evaluation of operating unit performance and quarterly earnings releases.

**PRIOR EXPERIENCE**

**HONEYWELL Industrial Automation & Control - Phoenix, AZ:** Manager, Manufacturing & Supply Management Finance and Manager, Export & Support Operations Finance; **Latin American Region - Miami Lakes, FL:** Manager, Financial Planning & Reporting; **Corporate Headquarters - Minneapolis, MN:** Analyst, Financial Planning & Analysis

**COOPERS & LYBRAND (now PwC) – Detroit, MI** *International accounting firm providing audit, tax and consulting services to individual, private and publicly-held clients.* Supervisor, Tax Department and Senior, Audit Department

**EDUCATION****THE UNIVERSITY OF MICHIGAN ROSS SCHOOL OF BUSINESS – Ann Arbor, MI**

Master of Business Administration (with High Distinction); Concentrations in Finance and International Business  
Bachelor of Business Administration (with High Distinction); Concentration in Accounting

### **CERTIFICATIONS, MEMBERSHIPS AND TRAINING**

- Certified Public Accountant, Michigan and Arizona (Current)
- American Institute of CPAs, Arizona Society of CPAs and Financial Executives International (Current)
- Leadership at the Peak, Center for Creative Leadership (2013)
- Executive Program in Leadership, Stanford University (2009)
- Honeywell Six Sigma Plus Black Belt for Leaders Training (2004)
- Spanish Language Certificate (Level 4/Intermediate), Berlitz Language Centers
- Certificate in Taxation, Walsh College of Accountancy & Business Administration

### **VOLUNTEER LEADERSHIP**

- Member of Finance & Audit Committee for Valley of the Sun United Way (current)
- Member of Ending Homelessness Advisory Council for Valley of the Sun United Way (2012 – 2016)
- Member of Finance Advisory Board for W.P. Carey School of Business at Arizona State University (current)
- Member and board member at Faith Bible Church in Glendale, Arizona (current)
  - Served as board chair (2008 – 2010 and 2013 – 2016)
  - Provide coaching for assimilation of new members as well as leaders of small groups (2016 to present)
  - Youth mentor for junior high/high school students including service & outreach trips to Mexico, the Navajo Reservation, Las Vegas and India (2007 - 2013)