

# CLIENT NAME, MBA

Address, City, State ♦ [clientname@yahoo.com](mailto:clientname@yahoo.com) ♦ Professional Website

## FINANCE DIRECTOR

*Analytical Solutions ~ Business Development ~ Due Diligence ~ Portfolio Management  
A Recognized Authority in Cost Control, Proficient in All Aspects of Finance, Budgeting and Auditing*

- **ACCOMPLISHED, INTUITIVE AND SEASONED FINANCE DIRECTOR** with a **Master's Degree in Business Administration** and expertise in financial consulting, business process improvement, business analysis, program management and financial management with Fortune 500 and public sector clients. Designed and Developed "Just in time Preventive Property Equipment and Supplies Inventory" database system to keep track of the supplies and place order to fill the need and usage of the CBC facility, which has resulted in an effective delivery system.
- **PROJECT DEVELOPMENT AND FINANCIAL MANAGEMENT EXPERIENCE INCLUDE:** corporate environment, not for profit, comparative bioscience search, university and foundations. Seventeen years of proven management experience in: budget and financial management, financial analysis, internal control and policies, internal and external auditing, quality management, project development, contracting, fixed asset management, corporate taxation structure, contractual and purchasing management and administrative operations.
- **KNOWLEDGEABLE IN PERTINENT GOVERNMENT REGULATIONS SUCH AS SOX, CAS, & GAAP.** Eloquent conversationalist experienced in delivering articulate and in-depth presentations and strengthening relationships with business partners, peers and senior leadership. Trusted mentor, guide and director of diverse teams in line with aggressive performance metrics

## AREAS OF EXPERTISE

Strategic & Tactical Planning • New Business/Client Acquisition • Negotiations • Process Streamlining  
Accounts Payable/Receivable • Interdepartmental Invoices, Journal Entries, and Fund Transfers • Financial Audits  
Internal Control Procedures • Profit & Loss Special Financial Reporting • Fixed Asset Management • Budgeting &  
Forecasting • Capital Expenditure Analysis • Information Risk Management • Oracle Financial Conversion • Competitive  
Analysis • Language Proficiency: Fluent in Chinese (Cantonese and Mandarin)

## BENCHMARKS & MILESTONES

- **Business/Client-Base Expansion:** Render invaluable assistance to the Associate VP in introducing services with new and existing investigators to expand the utilization of additional housing racks and cages; develop new animal housing business opportunities; participating in the MOU negotiations with Columbia and New York University.
  - Finalized the signed Columbia University MOU and amendment.
  - Finalized the signed New York University MOU and amendment.
  - Finalized the signed OSI amendment.
- **Contract Negotiations:** Successfully negotiated several service contracts resulting in significant savings (MOU with Priority One, NYU, MSKCC, Weil Cornell, Dynasys and caging system company, and W. F Fisher animals feeding and formula).
- **Streamlined the CBC Disaster plan.** In absence of Facility management, providing the backup Management and documentation of CBC operations under crisis conditions as experienced during Hurricane Irene and Hurricane Sandy. Primary objective to minimize the potential damages and reduce risks to animal colonies was achieved.

## PROFESSIONAL EXPERIENCE

**COLUMBIA UNIVERSITY**, New York, NY, Institute of Comparative Medicine (ICM)

**2014-Present**

### Administrative Director

- Leverage considerable experience in financial management, financial consulting and financial operations oversight to serve as a key member of its executive management team at ICM.
- Oversee and manage the department's finance and accounting practices, as well as its financial relationships with the Medical School, Columbia University Medical Center, Columbia.

### University and other affiliations.

- Direct and control the reporting and control systems, report generation, forecasting models, and reconciliation procedures for departmental accounts as well as accounts of other entities.

- Increase financial profitability by developing business plans and fiscal projections for new and proposed programs.
- Strategically negotiate with external entities to maximize financial resources.
- Provide oversight, administrative direction and training to ICM staff for all administrative matters related to grant activity.
- Demonstrate full compliance with all audit requirements and implement all audit recommendations in a timely manner.
- Manage research-related financial activities to assure compliance with University, P&S, and funding agency regulations; prepare reports as required.
- Supervise ICM administrative staff and manage departmental human resource functions such as, recruitment/appointment of staff, orientation, payroll, purchasing and accounts payable processes and other related functions.
- Define and determine the appropriate organizational structure and mix of staff to maximize departmental operations and minimize expenses.
- Utilize compensation strategies which comply with and further the overall mission of the University, the School and the department.
- Manage facilities and space for the department, collaborating with CUMC facilities and space management staff.
- Develop and monitor a capital plan incorporating short and long term capital needs of the department.
- Manage the departmental space and equipment inventories.
- Coordinate with CUMC facilities management on departmental renovation and construction projects.
- Develop and implement department information technology plan and policies.
- Collaborate in the formulation of strategic plans for the department; create administrative plans that support the overall goals of the department; coordinate strategic planning processes.
- Advise Director/Vice Dean for Administration on implementation and monitoring of strategic plans including staffing requirements, faculty recruitment, space assignments and financial plans necessary to meet goals of plans.
- Periodically review administrative structure of the department to assure the structure meets the strategic and operational goals of the department; create and implement revised structures as necessary and appropriate.

ROCKEFELLER UNIVERSITY, New York, NY

2001-2014

**Comparative Bioscience Center (CBC)**

- **Associate Director (Chief Financial Officer and Business Manager), 2010-2014**

**Finance Office**

- **Assistant Controller, 2006-2010**
- **Director, Accounting Services, 2005-2006**
- **Senior Manager of Budget, 2004-2005**
- **Manager of Accounting Information Systems, 2001-2004**

As Associate Director, served as a key member of the executive management team overseeing business and financial affairs, facilities and construction, information technology, and yearly capital improvement program.

**Key Accomplishments**

- Liaised with the Fiscal Resource Management, Audit and Compensation.
- Added immeasurable value to this critical role through a strong grounding in financial management and leadership, a creativity and drive to explore and execute new ideas, projects and systems and to help achieve the University's strategic vision.
- Delivered a secure personal and collegial style that ensured effective management in a highly complex institutional environment.
- Re-engineered new Census and billing systems and completed in three months, which increased additional \$1 million dollars within months.
- Re-negotiated Labor contracts and the pricing with vendors and services providers to lower the cost and increase bottom line.

*Previous positions include Controller and Assistant Controller for United Nations Associations of the United States of America in New York, NY; Senior Budget Accountant for Rockefeller University, New York, NY; Assistant Controller for Windows on the World, New York, NY; Foreign Currency Trader/Assistant to the VP of Operations for Goldman Sachs (Formerly, Spear, Leeds & Kellogg), New York, NY; and Auditor for M.C. Law & Company, CPAs, Hong Kong*

**EDUCATION. CERTIFICATIONS. RECOGNITIONS**

**Zicklin School of Business at Baruch College, City University of New York**

- EMBA, 2006
- Master in Business Administration in General Management

**Queens College, City University of New York**

- Bachelor of Arts: Dual Majors in Accounting Information System and Economics

**Professional Certificates**

- Licensed CPA in State of New York, 2004
- Licensed CPA in State of Virginia, 2001

**Professional Recognitions**

- CPA EXAM GRADER (FARE SECTION), July 2002- November 2003
- CPA obtained through AICPA Examination, November 2000
- Member of AALAS
- Member of the Institute of Internal Auditors
- Member of the AICPA
- Member of the New York Society of CPAs
- Member of the Virginia Society of CPAs

**TECHNICAL PROFICIENCIES**

**Computer - Systems Operation:**

- UNIX, IBM-PC (DOS), NETWORK (Novell, Window-NT, Window XP &2008)
- Languages: C, BASIC, and Database
- Applications: Microsoft Office 2010 (Excel, Access, Word, Excel, Power Point), WordPerfect, Crystal for Windows

**Financial and Enterprise Systems:**

- Atune System, tick@lab, Lab Animal & Facility Management Software System
- PeopleSoft, ARC and DFS
- Dynasys, Animal Census System, RFID Upgrade
- Oracle Financial, Oracle data warehouse
- FRS (Finance Record System)
- Point of Sales of Squirrel
- Blackbaud QuickBooks

**AFFILIATIONS**

**Community Service**

- Executive Board Member of Bayside High School, Bayside, New York, 6/13 - Present
- Committee Member, Financial Standard Accounting, New York Society of CPAs, 6/05-11/06
- Committee Member, SEC Practice Committee, New York Society of CPAs, 6/05-Present
- Committee Member, Anti-Money Laundering and Terrorist Financing Committee, New York Society of CPAs, 6/05-Present
- Committee Member, Real Estate Committee, New York Society of CPAs, 6/05-Present
- Committee Member, Not-for-Profit, New York Society of CPAs, 6/03-5/05
- Committee Member, Government Accounting & Auditing, New York Society of CPAs, 6/02-6/05
- Committee Member, Information Technology, New York Society of CPAs, 6/02-5/03
- Committee Member, Mediation & Arbitration, New York Society of CPAs, 6/03-5/04
- Board Member and Treasurer of the Pavilion Owners Corp., 10/03-5/08