

### **SUMMARY**

More than eighteen years of auditing and local government experience with expertise in the following areas:

- Local Government Audits
- Preparation of Comprehensive Annual Financial Report
- Debt Issuance
- Financial and Debt Management
- Process Improvement
- Federal and Florida Single Audit Acts
- Public Procurement
- Innovation
- Leadership
- Customer Service
- Labor Negotiations
- Municipal Budgeting

A Florida Certified Public Accountant with significant local government experience and demonstrated skills in leadership, auditing, capital finance, budgeting, continuous improvement, and collaboration.

### **EXPERIENCE**

#### ***Finance Director, North Port, FL***

**2011-Present**

The City of North Port has grown to approximately 65,000 residents, with a projected build-out population of 250,000. It is a southwest Florida community located in Sarasota County between Tampa and Fort Myers. North Port has budget of \$126 million, 589 full-time equivalent employees and is a full service City including; Police, Fire, Utilities, Public Works, Solid Waste, Parks and Recreation, Finance, Information Technology, and Human Resources.

Duties and Responsibilities as Finance Director: Direct responsibility over Accounting and Financial Reporting, Budget, Purchasing, and Payroll.

- Serves as fiscal advisor to the City Manager. Prescribes and supervises all accounting procedures. Furnishes all data required by City Manager, City Commission and various departments in respect to fiscal and budgetary matters.
- Reviews and interprets laws affecting fiscal policies and procedures.
- Overall responsibility for accounting system and controls.
- Coordinates budget preparation, revenue estimates, and annual budgetary reports.
- Approves purchase orders.

#### **Achievements:**

- Oversaw the defeasance of the City's outstanding sales tax revenue bonds.
- Secured State Infrastructure Bond financing in the amount of \$10M for the completion of the final phase of Sumter Boulevard, a major evacuation route for the area in the event of an emergency.
- Secured \$46M of revenue bonds for the reconstruction of 266 miles of roads in the City.
- Oversaw the implementation of a procurement card program. The City's rebate has reached \$76,000 in fiscal year 2014.
- Drafted and implemented a Fund Balance Policy for the City to ensure ongoing financial stability.
- Awards
  - Annually awarded the Government Finance Officers Association Certificate of Excellence for Budgeting.
  - Annually awarded the Government Finance Officers Association's Certificate of Distinction for Comprehensive Annual Financial Reporting.
  - Awarded the Home Rule HERO Award from the Florida League of Cities.

**City of North Port, Florida**  
***Accounting Manager*****2008 – 2011**

Duties and Responsibilities as Accounting Manager: Reported to and assisted the Finance Director in oversight of all accounting and financial reporting duties. Direct responsibility for accounting, accounts payable, revenue management, fixed assets, travel and central cashiering.

**Achievements:**

- Oversaw the annual audit of the City's financial statements including Federal and State Single Audits.
- Analyzed and monitored the City's revenues and expenditures to ensure compliance with accounting standards and City budget.
- Prepares the divisions annual budget.
- Prepared the comprehensive annual financial report.
- Annually receive the Government Finance Officers Association annual certification of achievement for the Comprehensive Annual Financial Report (CAFR).

**Planned Parenthood of Southwest and Central Florida**  
***Budget Director and Senior Accountant*****2007 – 2008**

**Duties and Responsibilities:** Manage accounting and payroll staff. Oversaw the completion of the annual audit. Oversaw the payroll for seven facilities, accounts payable and cash management. Member of the Leadership Team for the organization and informs senior management of financial status and progress of the organization.

**Achievements:**

- Implemented the transition to a new payroll processing company.

**Audit Supervisor, Kerkering, Barberio & Co., P.A.****2006-2007**

Kerkering, Barberio & Co. is a full service CPA firm in Sarasota, Florida. The firm conducts audits of for profit and not-for-profit entities as well as Federal Single Audits.

**Duties:**

- Supervised staff and senior auditors in conducting audits of various entities.
- Reviewed workpapers and financial statements to ensure compliance with appropriate auditing and accounting standards.
- Member of firm's continuing education committee to ensure employees remained in compliance with all CPA requirements.
- Conducted special assignments, including interim controller and fraud investigations.
- Presented financial statements to senior management and boards of directors.

**Audit Supervisor, CPA Associates****1998-2000, 2003-2006**

CPA Associates is a full service CPA firm in Bradenton, Florida. The firm conducts audits of local governments, profit and not-for-profit entities as well as Federal and State Single Audits.

**Duties:**

- Supervised and managed staff and senior auditors in conducting audits of various entities.
- Prepared Comprehensive Annual Financial Report for local governments, including the implementation of GASB 34.
- Reviewed workpapers and financial statements to ensure compliance with appropriate auditing and accounting standards.
- Firm administrator for new auditing software and responsible for training and updating staff on new policies and procedures.
- Assigned to clients that required specialized tax expertise.

**CPA, Dowd, Whittaker & Killorin, CPA****2000-2003**

Dowd, Whittaker & Killorin is a tax and auditing firm located in Venice, Florida. While working at the firm, duties included, preparation of tax returns, outsourced bookkeeping functions for local businesses, audits of various entities as well as helping businesses establish systems of internal controls.

**United States Army and Florida National Guard****1989-1996****Equipment Records and Parts Sergeant**

Supervised and maintained records for the unit's maintenance department. Served in Gulf War. Awarded two Army Commendation Medals, Army Achievement Medal and Good Conduct Medal. Attended Noncommissioned Officers Primary Leadership Course.

**EDUCATION****Masters in Accountancy, University of South Florida****Bachelor of Science in Business Administration, University of South Florida****Continuing Education:**

- **Inaugural Florida Government Finance Officers Association Leadership Course**
- **Florida Public Employer Labor Relations Association**
  - Certified Florida Labor Negotiator

**MEMBERSHIPS AND PROFESSIONAL AFFILIATIONS**

- Florida City and County Management Association
- International City/County Management Association
- Florida Institute of Certified Public Accountants
- American Institute of Certified Public Accountants
- Florida Government Finance Officers Association
  - Legislative Committee
  - Director for Southwest Florida Chapter
- Government Finance Officers Association
- Alliance for Innovation
- National Employer Labor Relations Association
- Florida Employer Labor Relations Association