
Chief Financial Officer

39 years' success providing accounting, financial and tax services for organizations

Experienced professional with expertise in providing the knowledge and skills necessary to achieve operational success throughout all accounting and financial management processes for organizations. Skilled in leading teams, promoting strategic financial analysis, managing accounting systems and controls. Demonstrated proficiency in organizing and directing financial operations, executing account reviews while maintaining accounting systems and transaction records.

Highlights of Expertise

- Strategic Business Planning
- Auditing Systems / Controls
- Cash Flow Optimization
- Financial Management
- Contract Development
- Budget Administration / Management
- Financial Reporting
- Process Improvements
- Revenue Forecasting
- Team Building and Leadership

Career Experience

David J. Wenkel, CPA, Belleville, IL & Overland Park, KS

CERTIFIED PUBLIC ACCOUNTANT (1991 to Present)

Hold concurrent responsibility in serving a diverse range of clientele, providing high quality accounting services, providing federal, state, and local payroll and sales and use tax advice, representing clients before the IRS, state, and local taxing agencies, and ensuring long term partnerships, resulting in increased revenue and profit growth.

- ◆ Serve as a Contract Controller for multiple companies, utilizing resources including QuickBooks Desktop, QuickBooks Online, and Microsoft Office software, particularly Excel, to achieve detailed financial and tax documentation.
- ◆ Prepare annual federal, state, and local income tax returns for over 100 clients, in addition to facilitating monthly and quarterly payroll and sales and use tax services and returns for up to 25 business clients.
- ◆ Strategically represent business and individual clients throughout a variety of claims from government agencies, securing business relationships surpassing industry standards.

Phoenix Building Group, Inc., Stilwell, KS

CHIEF FINANCIAL OFFICER (2000 to 2008)

Tasked with serving as the financial controller in monitoring all accounting activities, establishing fiscal responsibility preparing all monthly and annual financial statements, reporting directly to the company President.

- ◆ Supervised accounts payable and payroll clerks, managing all aspects of planning, tracking and analysis for accounting and taxation functions.
- ◆ Addressed all information technology issues, resolving hardware and software problems, serving as the liaison between internal employees and the external IT hardware and service provider.

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- ◆ Managed auditing processes, communicating with external auditors, customers, and vendors to ensure accuracy and compliance with internal controls.
- ◆ Assisted in increasing annual revenue and profit growth from \$2 million in 2001 to over \$36 million in 2008.
- ◆ Monitored all financial transactions, generating \$15 million of new business within four years.

Additional Experience

Controller ▪ American Construction & Energy, Inc., Stilwell, KS

Controller ▪ Whitehead Roofing & Insulation, Inc., Bellville, IL

Partner ▪ Donald Otto & Company, Houston, TX

Manager ▪ Barineau, Otto & Company, Houston, TX

Education & Credentials

Master Level Courses in Corporate Taxation, Estate & Trust Taxation, International & Partnership Taxation
University of Houston, Houston, TX

Bachelor of Science in Accountancy
University of Notre Dame, South Bend, IN

Professional Development

- Certified Public Accountant
- QuickBooks Pro-Advisor

Affiliations

- American Institute of Certified Public Accountants (AICPA)
- Missouri Society of Certified Public Accountants (MSCPA)
- Texas Society of Certified Public Accountants (TSCPA)