

DIRECTOR, FINANCIAL PLANNING & ANALYSIS

Breadth & Depth of Expertise Spanning FP&A, Capital Investment Accounting, and Operational Budget Planning

► BUSINESS PARTNERSHIPS & ADVISORY SERVICES

Finance strategist positioned as a trusted advisor to executive and senior leaders. Offers astute rationale to steer decision making for Burlington Northern Santa Fe Railroad's \$20B in revenue and \$81B in assets.

► PROFITABILITY & VALUATION ANALYSIS

Led multiple FP&A projects that generated millions in cost savings and optimized profits and ROI. Designed and presented complex financial models to provide key insights to inform executive-level strategic planning.

► ORGANIZATIONAL EXCELLENCE INITIATIVES

Finance lead on high-impact technology enhancements. Fosters a culture of professional growth, enhanced productivity, and streamlined processes through talent cultivation and process reengineering.

Finance & Accounting Impact:

Automation technology—\$1.5B NPV

Labor contract negotiations—↓\$70M

Modeling for \$3.4B asset acquisition

Financial model redesign—<1% variance

\$20M reduction in depreciation costs

\$4.5B operating budget development

Finance lead for game-changing system

implementations including SAP

Cross-Functional Partnerships — Talent Development & Management — Financial Modeling & Analysis
Internal Controls & Compliance — Business Intelligence & Analytics — Profitability & Cost-Saving Evaluation
Annual & Long-Range Planning — Budgeting & Forecasting — System Implementations — Process Reengineering

CAREER PROGRESSION

CSI RAILROAD | Tampa, FL

2002 to Present

One of North America's largest freight railroad networks with \$81B in assets and \$20B revenue.

Project Manager, Strategic & Financial Studies (2014 to Present)

Trusted Business Partner — Strategic Financial Planning — Insight-Rich Guidance

Manage diverse financial modeling and analysis projects to steer decision making across the organization. Present findings to project sponsors and executive leaders on acquisition, procurement, business development, and workforce strategies. Established reputation for accurate financial models incorporating cost savings, revenue projections, operational changes, and long-term performance to calculate net present value (NPV), internal rate of return (IRR).

- ♦ Finance lead for disruptive automation technology initiative projected to **\$300M in annual savings**, liaising with senior leaders from 10 operating divisions for strategic initiative with **NPV of \$1.5B** over 10 years.
- ♦ Selected to redesign financial models for high-stakes contract negotiations with 13 unions, delivering analysis that achieved both company and union expectations while **reducing financial impact \$70M**.
- ♦ Provided financial impact analysis of a long-term locomotive maintenance strategy to **save \$250M** over 7-year-period.
- ♦ Developed scenario-based models to support **\$3.4B acquisition** of 1,500 locomotives presented to CFO and CEO.

Accounting Manager, Financial Reporting & Analysis (2012 to 2014)

Planning & Forecasting for \$1.4B in Overhead Costs — Data-Driven Decision Making — Financial Modeling & Forecasting

Oversaw planning, forecasting, reporting, account reconciliations, and monthly close processes to maximize \$1.4B in tax and benefits expenses. Developed annual overhead cost application rates. Managed and developed 2-member team.

- ♦ Improved cost application rate models and analytical tools to deliver a **less than 1% variance**.
- ♦ Key player in BlackLine account reconciliation system implementation and team training that transformed entirely manual processes for 1,500 active accounts and **redirected 750 labor hours to value-added activities**.

JOHN DOE

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CSI RAILROAD | continued

Accounting Manager, Capital Investment Accounting & Reporting (2008 to 2012)

Depreciation Planning for \$35M in Assets — Process Reengineering — System Implementation

Directed planning and oversight of capital investment budgets while strengthening and streamlining department practices and systems. Led 3-member team, earning reputation for exceptional quality and cross-functional collaboration.

- ◆ Overhauled depreciation study process for \$35M in assets, **slashing depreciation expenses \$20M** annually, reducing completion time by 3 months, and bringing studies current for the first time in years.
- ◆ Maintained exceptional compliance with Sarbanes-Oxley (SOX), achieving **perfect audit performance** results.
- ◆ Integral to function-wide migration to a **\$150+M SAP system**, integrating business needs into design to facilitate a seamless transition with minimal disruption.
- ◆ Documented internal alignment with GAAP reporting requirements to prepare organization for acquisition by Berkshire Hathaway, providing robust and accurate justification for accounting practices.

Budgets Manager, Operations Planning, Budgets & Controls (2003 to 2008)

Planning & Reporting for \$4.5B Operating Budget — Project Management — Talent Development & Training

Earned promotion to lead planning, forecasting, and reporting for \$4.5M annual transportation operating budget, \$500M transportation support and service design budget, and \$325M leasing expense budget. Trained and developed new hires.

- ◆ Managed \$450M transportation operating budget for California and Chicago divisions—improving overtime, operating, and service expenses to **return \$15M to the business**.
- ◆ Revamped expenses book and associated materials to improve productivity and reduce turnaround times.
- ◆ Redesigned relative measures reports to facilitate integration with Essbase and reduce potential for human error.

Senior Analyst, Capital Planning & Forecasting (2002)

\$3.5B Capital Spend — Financial Modeling — Process Improvement & Automation

Reengineered capital forecasting system to eliminate 25 labor hours per month and accelerate monthly report delivery. Provided critical industry data, competitor analysis, and market trends to support long-range strategic capital-planning process. Produced complex financial models for annual capital plan, incorporating revenue, inflation, and cash flow estimates.

COMMUNITY BANK, Tampa, FL | Financial Business Analyst

2000 to 2002

Advised business partners throughout development of \$1.2B annual budget. Introduced financial management and forecasting systems, earning recognition from the Board of Directors. Produced feasibility and marketing studies to evaluate new business opportunities. Presented financial performance and variance reports to executive management team.

HITEC PHARMACEUTICALS | Financial Analyst, International Finance

1999 to 2000

Supported controller with \$800M annual budgeting operations. Coordinated with controllers in 7 different countries. Developed cash flow projections for Chinese and Japanese operations. Instituted financial reporting by major product line to improve decision making and reorient managerial focus toward bottom-line growth.

EDUCATION

MASTER OF BUSINESS ADMINISTRATION, Accounting & Finance | University of Nebraska

BACHELOR OF SCIENCE, Civil Engineering | University of Engineering & Technology | University of Nebraska