



Walt R. Simpson, CPA

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**Chief Financial Officer :: Director of Business Finance :: Corporate Controller**

*Strategic forecaster, planner, and lead relative to core financial areas, including P&L, departmental budgeting, contract management, banking, treasury management and accounts receivable and returns*

Senior financial professional who audits, analyzes, and streamline large businesses, addressing on-going operational issues affecting address financial findings and change management strategies, cu utilize during business planning and steering phases. Utilize effect human side of human resources and staff management, applying from new and seasoned personnel. Work history encompasses an surrounding franchisees — assist with educating and following fin financials for multiple business locations, including contracts, bud profit/loss reporting. Network closely with outside auditors, bankers and attorneys.

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**Education**

- M.S., Accounting** (*Emphasis: Tax*) • Wright State University, Dayton, OH • expected December 2009
- B.S., Business and Accounting** • Wright State University, Dayton, OH
- Certified Public Accountant (CPA)**

**Professional Career**

**Chief Financial Officer (CFO)/Tax Manager • 1992 – 2009**

Company Confidential

*(Led complete financial, tax, and accounting functions for nine divisions and 140 corporate and franchised convenient stores with the assistance of 38 accounting, data processing, human resources, and employee benefits Prepared, reviewed and discussed overall "financial health" with the Board of Directors, Shareholders, and other financial stakeholders in the company.)*

- : **Appointed as Corporate Secretary in 1995, reviewing and implementing in excess of 300 lease and franchise agreements, as well as, \$5MM in store purchase contracts in collaboration with legal counsel.** Directed complete purchase logistics, starting with an in-depth store valuation to determine purchase price and/or terms.
- : **Led complete human resources tasks while serving as Corporate Personnel Director.** Managed recruitment, hiring, training, coaching, and delegation of tasks. Selected top performers and developed a loyal staff that resulted in a meager 2% turnover rate amongst staff with an average 20-year tenure.
- : **Authored and directed the completion of reports utilized by management teams during business steering and analysis meetings,** as well as, for third-party accounting firms to complete year end audits of the financial statements
- : **Consulted with franchisees on a variety of financial and management issues, including those involving accounting, finances, and reporting.** Assisted franchise owners with interperating financial statements, budgetary line items and other accounting/financial documents designed to maximize profits and owners return on investment.
- : **Collaborated with legal teams when negotiating new franchise and buy/sell agreements, franchise buy-backs, and other multi-layer contracts requiring counsel.** Worked with attorneys on other legal issues that rose involving employment/labor law or concerns relative to occupational safety/health compliance.



*(Professional Career, cont'd)*

- : **Reviewed and renegotiated comps offered to employees, integrating cost controls without hindering insurance coverage and overall benefits to the staff.** Shopped for competitive quotes from top insurance carriers, meeting with the management team to decide on benefit coverage.
- : **Proposed additional compensation and benefit programs for employees ...**
  - o *Implemented dental and vision coverage to further benefit staff health and wellness*
  - o *Established and managed a 401K plan as Administrator/VP/Asst. Treasurer (until 2004) for 72 related corporations*
- : **Directed HR department ranging in size from 3 to 38 direct reports.** Oversaw complete staff management and development, organizational development, benefits and compensation, and evaluations/reprimands for support-level staff up to management and executive members.
- : **Established a business entity, Eagle Fidelity, to sell money orders at each of the 137 stores located throughout Ohio and Kentucky.** Started in 2005, generating \$1.7M per week in sales. Implemented policies as Compliance Officer — ensured adherence to state/federal regulations.
- : **Authored seminar booklets for franchisees, including a one-day seminar entitled Building & Understanding Your Financial Statement.** Trained employees as well, touching on topics relating to team building, effective communications, proper policies/procedures, and business ethics
- : **Managed reprogramming initiatives both from a Honeywell-Cobalt based system and a Windows-based system.** Met and advised programmers on system requirements (both a wish list with absolute need), consulting with the IT team throughout system development, testing, and troubleshooting.
- : **Supported executive and board personnel, maintaining high levels of confidentiality.** Nurtured relationships and maintained open lines of communication with superiors that ensured a solid foundation amongst management and executive teams.

## Professional Affiliations \_\_\_\_\_

American Institute of Certified Public Accountants (AICPA)  
Indiana Society of Certified Public Accountants (KSCPA)  
Ohio Society of Certified Public Accountants (OSCPA)

*MS Word, Excel, Lotus 1-2-3, Intuit/Lacerte Tax Software*