

CFO RESUME CHEAT SHEET

Quick tweaks to increase your interview rate

CHIEF FINANCIAL OFFICER

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Powerful & “Unselfish”

Branding Statement →

Scaling businesses rapidly by defining financial growth strategies, revitalizing budget reporting, and nurturing investor relationships.

Your Key Strengths →

History of Millions in Cost Savings | FP&A Leader | Organization Goal-Vision Alignment | Long-Term Business Scalability

Major & Relevant Strengths

Follow each strength up with proof.

Results-Focused Summary Section

This includes keywords, which are important for ranking in Applicant Tracking Systems and job boards like Monster and LinkedIn.

- **Consistent Sales & Profitability:** Grew annual volume to ~\$4B and NOI by 50 BPS at Building Loans Inc. by instituting a change-oriented, compliance-heavy environment; introduced MSR portfolio, expanded product outlets, and rightsized team by 18%.
- **Executive-Level Decision-Making:** Instated business transparency for executive leadership at Building Loans Inc. by formalizing regular goal-based meetings with the CFO; simplified complex data and reported on departmental roles and project impacts.
- **Business Process Transformation:** Led swift loan portfolio processing at Wayne Enterprises by building a due diligence reporting platform for investors; managed a 20-member IT team with the COO. Enabled visibility of portfolio progress company-wide.

Budget Optimization & Cost Control
Financial Management & Forecasting
Cash Flow Management & Prediction

BSA, AML, & GAAP Compliance
Policy & Regulatory Enforcement
Fiscal Program Development

Team Recruitment & Leadership
Stakeholder Relationship Development
Nurturing Employee Growth

PROFESSIONAL EXPERIENCE

Vice President & Chief Financial Officer, Building Loans Inc.

03/2014 – Present

Turned around stagnation and promoted annual volume increase from \$2.5B to \$3.8B by transforming company operations. Grew average NOI by 50 BPS by building secondary market and additional revenue streams. Supervised 6 managers as well as accounts payable, accounts receivable, budget forecasting, financial reporting, commissions, loan accounting and servicing, and 2 subsidiaries. Conducted administrative and financial planning to support 7 executives, 20 regional and branch managers, and 18 departments.

Strategic Process Improvement

- Instilled consistent rolling budget meetings into the corporate culture. Surpassed competitors by implementing benchmarking to assess and optimize KPIs. Established contingency plans and daily liquidity monitoring.
- Standardized month-end closing by replacing a convoluted, multiuser Excel sheet with a shared, ERP-based process with consistent delegation systems. Ensured uniformity in workflows, assignments, deadlines, and reviews.
- Expanded data warehouse and increased visibility to key insights and outliers for warehouse lenders; replaced manual and faulty Excel processes with Loan Vision ERP integrated with SAP Concur.
- Streamlined executive communication and decision-making by forecasting revenue variances and suggesting process upgrades.
- Grew balance sheet by 50% by assessing individual product performance and loan officer spending to optimize service offerings.
- Automated global commission calculations and enabled swift and continuous loan origination processing.

Financial Management & Forecasting

- Facilitated capital projects and IT plans by managing net returns, marketing ROI, scorecards, and price concessions as well as ROE, BPS, cash flow, and benchmarking KPIs; calculated BEP, hedge ratios, profit leakages, and pull-through rates.
- Cut costs by revamping margin and fee structures; conducted scenario, break-even, and outsourcing cost analyses. Predicted changes to the industry, GDP, sales roster, pricing rates, economic indicators, and employment metrics.
- Enhanced spending accountability and visibility of budget changes and purchase and work orders by installing approval systems.
- Led tax filing, book adjustments, book-to-tax reconciliations, and state nexus compliance while overseeing the tax department.
- Ensured adherence to BSA, AML, CFR, CFPB, GSE, Dodd-Frank Act, State Department, and LO Compensation regulations.

Stakeholder Relationship Development

- Led swift change management. Fostered staff engagement by promoting cross-training, update meetings, mentorship programs, and team-building exercises. Eliminated silos by building strong channels of communication, including reporting portals.
- Improved segregation of duties based on skillset-corporate alignment; boosted warehouse and vendor team performance.
- Enhanced reporting transparency for managers by substituting individual reporting packages for a consolidated financial portal.
- Reduced employee turnover by 28% by optimizing compensation plans, sales commissions, and bonus structures.

Promoted to Chief Financial Officer, Wayne Enterprises

08/2012 – 02/2014

Controller

10/2009 – 08/2012

Converted a \$50M startup into a \$1B real estate investment organization within 5 years; forecasted economic indicators, generated Wall Street capital; built an investment group; and established internal controls, functions, and teams from scratch. Prompted company sale by leveraging fast-paced growth to reach the liquidity event objective.

- Enabled swift growth and acquired portfolios nationwide by improving process transparency, FP&A systems, and adherence to audit and investor requirements. Transformed accounting and compliance functions.
- Established an optimal accounting and administrative leadership and built due diligence, compliance, and sales teams. Balanced experienced professional and new grad hires based on position requirements.

Controller, CT Communities

06/2005 – 10/2009

Ensured accuracy in book closing and reporting while conducting tax work on in-house partnerships. Raised private equity capital by presenting a pro forma business plan. Oversaw accounting, billing, collections, payroll, tax compliance, and administrative functions.

- Nurtured fast growth and scaling by raising added PE capital; presented historical reports and created housing development and sales plans from scratch. Worked with lenders to create stringent lien release and contractor payment schedules.
- Retained business long after competitor closure by performing strategic cost cuts and layoffs following housing market crash.

Senior Manager, R&A CPAs

07/1997 – 06/2005

Retained #1 realization rate for 3 years. Promoted 4 times in 8 years based on client acquisition and management.

- Increased retention and realization rates by optimizing workloads and schedules to reduce employee burnout. Improved work relationships by introducing incentive bonuses, team-building exercises, and a company-wide mentorship program.

EDUCATION & INVOLVEMENT

Bachelor of Science in Accounting, The University of California, Los Angeles

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Certified Public Accountant (CPA), Arizona State Board of Accountancy

Certified Public Accountant (CPA), Virginia Board of Accountancy

Mortgage Servicing Training, Mortgage Bankers Association

Mortgage Accounting Training, Mortgage Bankers Association

Mortgage Compliance Training – BSA, AML, SAFE Act, Mortgage Bankers Association

Member, Mortgage Bankers Association (MBA)

Member, American Institute of Certified Public Accountants (AICPA)

Member of Finance Committee, Habitat for Humanity

Volunteer Youth Soccer Coach

In your resume, do not...

- Use vague self-descriptors like “problem-solver.”
- Lie.
- Be redundant.
- Use a “self-centered” objective.
- Write large blocks of text or long, convoluted sentences.
- Make grammatical mistakes.
- Cut off your earlier career experience.
- Use graphs, multiple fonts, tables, columns, or the header section of Microsoft Word unless you’re 100% certain your resume will not be uploaded to an Applicant Tracking System.
- Write your career objective.
- Forget to bring a couple copies of your resume with you to interviews.
- Use half-pages. Write a full page or two full pages.

Need resume help?

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