

KRISTIE SAMS, CCMP, CSSGB, SA

ARMY VETERAN

Desired Location - Florida

QUALIFICATIONS

An executive with 20+ years of global experience with leadership and communication skills has driven success stories across companies spanning various industries. Strengths include business expansion & startups, change management, operational assessments, strategic & tactical plan creation, cost reduction & budgeting, brand creation & positioning, supply chain management, SOP/KPI creation & assessment, continuous improvement (Kaizen) and pull, value stream mapping, sustained cost transformation effort, output & optimization, financial statements, financial & business analysis, inventory management, business development, risk management, conflict resolution, treasury & cash flow management, contract negotiations, mergers & acquisitions negotiations, internal controls/auditing, sales & marketing management, systems evaluations, compensation models, quality & control analysis, lean/six sigma leadership, internal and external reporting to various stakeholders.

Multifaceted Catalyst aggressively faces challenges, quickly assesses situations, and develops/implements action plans to drive profitable financial performance. Problem solver who willingly accepts challenging assignments. Skilled in complex transactions, negotiations, M&A due diligence, compliance and capitalization, operational assessments, creation of strategic and tactical plans, change management, performance-based training, and the ability to suggest and implement changes for underperforming companies that show results on all levels of business.

Myers-Briggs Type Indicator® - Commander ENTJ-A/ENTJ-T

DiSC Assessment – Di (Dominate/Influencer)

Predictive Index – Controller

Certified Change Management Professional

Certified Lean Six Sigma Green Belt

Scaled Agile (Leading Safe Course 5.1)

***In progress: SHRM-CP 9 (Exam Dec 11, 2022); Supply Chain Professional (CSCP); Certified Management Accountant (CMA)**

PROFESSIONAL EXPERIENCE

Turnaround & Operational Performance Improvement Professional

Jackson & Partners, LLC (COO/EVP Startup Buildout, **F&B/CPG/B2B/B2C**), BP Medical (Interim **CEO/Liquidation, Manuf./B2B**) dba KNC² Medical Supply (CEO/Startup Buildout; Redistributor); CENTiCARE Corporation (Interim **COO/Complete Turnaround; Manufacturing**), VEJ Holdings, LLC (EVP/CFO/Start-up Buildout then Merger into J&P, LLC/**F&B/CPG/B2B/B2C**), DG&A (CFO/Complete Turnaround) Elysium Real Estate Investment Group, LLC (CEO/Startup Buildout/Real Estate), FCM Buildout (Mortgage Division/SBU Growth/Tactical Plan/Banking)
3/2013 – Current

Expertise extends to **Brand Creation, Positioning & Multi-Channel Marketing Campaign Creation/Implementation** (such as DNA, brand messaging and development, create assessment and growth tools related to a particular brand, life-cycle marketing strategist; B2B/B2C, RFP's), **Change Management & Operational Assessments** (such as time and motion studies (time spent on key activities, value of non-value-added tasks), Resource & System Gaps/Workflow & Layout Opportunities (process, systems, software, people, equipment, network infrastructure reviews (current state baseline and future state needs)), **Financial Performance/Balance Cost/Revenue Objectives/Economic Modeling Analysis and Tools**, Service and **Product Assessments, Supply Chain Improvement Analysis**, Best Practices Development and Implementation, Creating and Evaluating Performance Measures (KPI's for Financial, Operational, Sales etc., assessment/creation and restructuring of the general ledger, financial statements, financial analysis, inventory management and reconciliation, costing, budgeting, treasury and cash management, account reconciliation, internal controls/auditing, credit/collections, payroll processing, internal and external reporting.), **Creation of Strategic Plans and Tactical Plan Creation**. Define, plan, and execute strategic organizational change strategies from people and systems to close performance gaps. **Organizational Management & Transformations/Change Management** (restructuring, hiring, layoffs, consolidations, and acquisitions, teaching performance management strategies and processes, focusing on handling performance challenges, setting clear expectations, and creating development plans, SOW's). **Performance-based Training and Coaching** (which maximizes contributions to the company, coaches individuals to improve their abilities to lead and manage, instill the value of innovative leadership, teaches conflict resolution skills, as well as helps leaders, recognize the potential for conflict before it arises, improves communication channels for productive cooperation/teamwork, identify core values and establish interaction ground rules, assess personal work styles and provide coaching as needed.) Sustainable **Supply Chain Management** (Operate/Design/Manufacture/Deliver Goods Globally and Domestically. Vendor & Customer Relationship Management. Warehouse Management (On Demand, Cold Storage, Distribution Centers) Transportation Management (LTL/FT, Air/Ocean Freight, Customs) Inventory Management (Asset/Order Tracking, Production Planning Demand Forecasting/S&OP Planning, Dashboards and ERP Implementation.) **Product Development/Launch** (Product Optimization & Competitor/Market analysis, Formula Creation/Bench Samples/Prototypes, Regulatory/FDA Compliance/ Launch Strategy, Positioning & Messaging, Packaging Design, Marketing & Communications, Media Relations, Social Media Marketing. **Lean/Six Sigma/Scaled Agile** (Continuous Improvement Projects, correct Product Flow, Identify Solutions, Output expectations, Optimizing available space, Technical Agility, Value Stream Thinking, Lean product development/Enterprise solution delivery, Customer centrality, DevOps/Continuous Delivery Pipeline, Portfolio strategy & investment funding, Agile portfolio operations, and Lean governance.)

- **Experience in establishing priority, and providing governance strategy, vision & reinforcement to various stakeholders within and outside of the organization.**
 - Le Meridien – Global Brand Sale, US Liaison with Owned/Franchised Hotel Owners, Numerous Consulting Companies. Responsible extends to moving Office from NY to Chicago; US Liaison for entire Due Diligence Pre/Post Global Brand Sale & Stayed on as a consultant to liquidate the US Operations in its entirety, including but not limited to being named an Officer & Corporate Liaison for all US Tax entities, liquidated and merging 23 out of 28 Le Meridien subsidiaries to parent companies, termination of US benefits, lead for the sale of 3 hotels (net sales totaled 226 million) to include elimination j.e.'s, final audit, transfer of financials and hotel operations to the purchaser.
 - Change model used: Kotter Model (w/all new key stakeholders) & Bridges Model (w/previous key employees)
 - Change Readiness Assessments; & Impact Reports; outside of normal Due Diligence Process
 - Change Champions Network – was not developed due to Global Brand Sale; however, is typical in Post-Acquisition; or Departmental Restructuring and/or for various other reasons.
 - Creation of Communication Plans & Impact Assessments.
- **Extensive knowledge in managing numerous projects and designing work tasks and resources to implement various changes on time and within budget.**
 - Jackson & Partners; previous company merger and full buildout from a domestic-based company to importing globally from 5+ countries; buildout of a national sales office in Florida; creation of 7 brands, ideation to bench samples to go to market strategies and implementation for 90+ products to include all Sales (Revenue Operational Models/Implementation of CRM/Training/Compensation, Sales Team Structure & Training/Sales Forecasting), Marketing (Market Planning/Product Design & Development/Promotions/Regional & National Marketing Strategies/Packaging/Labeling), Finance (Financial Reporting Control/Financial Planning & Analysis/Treasury & Working Capital Management/Capital Budgeting/Risk Management/Corporate Strategy) Supply Chain Management (Procurement/Operations/Distribution/Integration), Logistics(Inbound/Outbound/Procurement/Global & Domestic) Q&A/Food Safety Department (HACCP/Created QA/QC Processes/Policies & Budgets), Distribution (Buildout of Multiple Distribution Channels B2B/B2C/Direct Delivery), pricing and operational matrix/SOPs and development of KPI's, forecasting, monthly and quarterly reporting for all departments.
 - Change model used: Kotter Model (w/all new key stakeholders) & Bridges Model (w/previous key employees)
 - Creation of Communication Plans, Change to KPI's/Metrics in various Phases of Build-out.
 - Numerous Project Assessments; scope, scale, budget, benefits, timeline, resources, capabilities analysis as well as Training Plans.
- **Thorough understanding and direct engagement with the people side of change and organizational readiness to help employees move from the current state to the desired state.**
 - (Confidential Company) went through a major organizational overhaul to include a new succession plan; termination of current employees, hiring and training of numerous department heads, and ultimately forcing key executives that were family out of the organization for the betterment of the company's future.
 - Change model used, Lewin Model & Bridges Model (w/previous key employees)
 - Leadership Coaching: Communication Plan, Resistance Management (was a major obstacle and took 9 mths to address); major issues with adoption of changes; however full adoption took place within 15 mths.

V.P. of Finance/C.F.O. (BBMC Division) - (Corporate Officer)

Bridgeview Bank Group, Lombard, Illinois

\$3B Mortgage Subsidiary

1/2011- 3/2013

- Manage all financial and accounting functions for Bridgeview Bank Mortgage Company, a U.S. wholly-owned subsidiary of Bridgeview Bank Group; before 2013, BBMC was a partnership, and direct reports were to managing partners.
- Accountability extended to GAAP financial statements, profit, and cash flow analysis, consolidation of monthly financial statements for BBG's Mortgage division, budget preparation and monthly variance reporting for BBMC, fixed asset tracking, treasury functions, costing, inventory management and reconciliation, and overseeing accounts receivable, credit, and accounts payable processes.
- Adept at establishing audit objectives, analyzing business procedures, documenting operating processes, preparing variance analysis, highlighting problems, suggesting improvements, and implementing corrective actions. ALM
- Thorough knowledge of regulatory compliance and industry best practices, including a comprehensive understanding of state and federal laws, including Sarbanes-Oxley (SOX), and responsible for ensuring compliance with local, state, and national (FDIC/HUD/FANNIE MAE) financial reporting requirements.
- Corporate liaison- IRS, State/Local Tax Authorities – 49 States, Plant Moran, Crowe, etc. *Mthly QC, Quarterly & Yearly Audits
- Review and analyze division transactions, reconciliations, and financial results for GAAP compliance, reasonableness, accuracy, and timeliness. Asset & Liability Management (ALM), Interest Rate Risk (IRR), and Liquidity Risk. Provide oversight of Liquidity, Cash Management, Budgeting, Profitability, and Secondary Mortgage Market functions.

Selected Accomplishments:

- Implemented a comprehensive budgeting process, operating metrics, and continuous cash flow analysis.
- Managed Software Implementation - fully designed and integrated manual books and records to AMB (Accounting for Mortgage Bankers *ERP Software)
- Initiated the updating and consolidation of general ledger accounts and management reports, to include a restatement of 2010 YEFinancials from cash to accrual and restated income to be in line with FASB91 and then a restatement of 2012 YE Financials to adopt FAS159.
- Coordinated YE and Interim financial audits in compliance with HUD and FDIC requirements.
- Created several departments to include Payroll, Servicing, and Customer Service, implemented policies and procedures within those departments, and assisted two (2) division mergers to include strategic planning and full integration into BBMC operations.
- Established and implemented accounting and finance policies and procedures. To include but are not limited to credit, A/R, A/P, budgeting, financial statement analysis and preparation, and cost center expense allocation.

Corporate Controller - (Direct Report to CFO/President)

Cathay Pigments (USA) Inc., Elgin, Illinois Head Office in China

\$70MM Manufacturing Company- Pigments/Chemical

3/08- 11/09 (Corporate Office Closure)

- Manage all financial and accounting functions for Cathay Pigments (USA) Inc., U.S. subsidiary of Cathay Pigments Holdings, Parent Company; located in China. U.S. Affiliate – Compass Chemical and Cathay Industries, LLC.
- Accountability extended to GAAP financial statements, profit, and cash flow analysis, consolidation of monthly financial statements for U.S. subsidiaries, budget preparation and monthly variance reporting for Valparaiso/El Mirage Plant Operations, fixed asset tracking, treasury functions, costing, inventory management, and reconciliation, overseeing accounts receivable, credit and accounts payable functions.
- Review and analyze division transactions, reconciliations, and financial results for GAAP compliance, reasonableness, accuracy, and timeliness.
- Supervise plant accounting staff and have three direct reports, with five dotted line reports.
- Organize and manage all corporate insurance renewals, tax, corporate, and audit schedules.
- Responsible for all U.S. Treasury functions & reporting to the parent company in China.
- Develop and train financial and administrative talent.
- U.S. Corporate liaison with BDO, IRS, Indiana & Arizona. Property Tax Assessors, etc.
- Ad-hoc reporting and special projects, including process improvements, inventory, audit support, and the like.

Selected Accomplishments:

- Responsible for decreasing the 08 audit from 13 to 5 months; cost savings to the company over 100k.
- Plan, Coordinate, and Manage plant closure in Arizona, to include the transition from QuickBooks to Chempax (Proprietary ERP system) for all accounting functions.
- Managed system upgrades for fixed asset tracking from Excel to FAS on a company-wide level.
- Established accounting and finance policies and procedures at the plant and corporate level. To include but not limited to credit, A/R, A/P, budgeting, and financial statement analysis and preparation.

Interim CFO - Starman (Starwood Capital Group/Le Meridien JV) (Direct Report to CEO) 11/05-11/06

with a 2 Mth Extension Regional Controller, The Americas 4/04-11/05

Le Meridien, Chicago, Illinois Head Office in U.K./Global Presence

\$144MM/2.4B + Hotel Management Company (US Division)/ Commercial Real Estate/Franchise

- From November 2005 – Responsible for liquidating the US Operations in its entirety, including but not limited to being named an Officer & Corporate Liaison for all US Tax entities, liquidated and merged 23 out of 28 Le Meridien subsidiaries to parent companies, termination of US benefits, lead for the sale of 3 hotels (net sales totaled 226 million) to include elimination j.e.'s, final audit, transfer of financials and hotel operations to the purchaser.
- Worked closely with country-level controllers on month-end/year-end close, internal controls, conversion into US GAAP, currency, inter-companies, and many other areas.
- Managed all financial and accounting functions for 18 active U.S. subsidiaries of Le Meridien Hotels & Resorts LTD. Accountability extended to GAAP financial statements, profit, and cash flow analysis, consolidation of monthly financial statements for U.S. regional hotels, budget preparation and monthly variance reporting for U.S. corporate entities, performed internal audits of owned hotels, hired accounting staff at the hotel level as needed.
- Project manage all stages of internal audits, creating schedules, establishing requirements, documenting methodologies, meeting with stakeholders, and aggregating and examining data for franchised and managed hotels.
- Supervised hotel accounting departments and have four direct reports, with ten dotted line reports. Prepared ST-1, 5500, quarterly & year-end employment, corporate tax, and audit schedules. Lead for all U.S. Due Diligence reporting in preparation for the brand sale. Responsible for all U.S. Treasury functions.

- U.S. Corporate liaison with KPMG, IRS, N.Y. Property Tax Assessors, Caron & Bletzer, E&Y, PWC, Kroll, etc. Reported directly to VP of Finance, the Americas, Deputy CFO, and CFO.

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Selected Accomplishments:

- Recreated financial statements for 18 U.S. entities for seven months and transitioned the accounting department from New York to Chicago.
- Liquidated 23 U.S. entities and prepared the elimination J.E.'s to transfer assets and liabilities to the remaining five tax entities. Managed U.S. Due Diligence and Transitional Team during the sale of the Le Meridien brand to Starwood Hotels.
- Established accounting and finance policies and procedures for the Regional Accounting Department. To include but not limited to A/R, A/P, Credit, Cash Management, Budgeting, and financial statement analysis and preparation.
- Performed periodic internal audits of corporate-owned and franchised U.S. hotels.
- Liaison for the sale of 3 corporate owned U.S. hotels.
- Established inter-company cross charge policies between U.S. entities and International entities.
- Introduced New Employee Manuals, reimbursed employees for improper benefit deductions, and prepared a full audit on personnel files, benefits, and payroll deductions for all regional employees. Interim Regional H.R. Director
- Promoted from Regional Accounting Manager in June 2004 to Regional Assistant Controller and then to Regional Controller in December 2005.

Senior Cost Accountant - 06/2002- 04/2004

H.D. Hudson Manufacturing Company, Chicago, Illinois

\$62MM International Manufacturing Company

- Responsible for use & sales tax reporting, fixed assets (FAS Best), accruals, Unicap, journal entries, dividend disbursements, domestic and international wire transfers, investment, and loan schedules.
- Responsible for the reparation, overseeing, and reviewing cash management functions, bank reconciliations, and preparing cash flow statements for the Director of Finance daily.
- Handled financial statement preparation/analysis, year-end reconciliation schedules, and 5- year budget trend analysis using M2K and MS Excel.
- Processed payroll for four locations, W-2 & 1099 preparation, administered insurance, 401K, Flex, Vol. Insurance & Pension benefits for all locations.
- Monitored accounting functions performed by A/R, A/P, and H.R. reps at company locations.

EDUCATION

B.S., Finance- DePaul University (Graduated- 2003), Fund, Corporate, Cost & Forensic Accounting

United States Army Reserves — Rank E-4 (Corporal) 1997-2004

Change Management Professional Certification - ACMP® Approved Course - Certificate # C11841

Lean Six Sigma Green Belt Certification – ISSInstitute™ Approved Course – Certificate #97542843182571

Leading SAFe Course (5.1) – SAFe Scaled Agile Approved Course - Certificate #74059068-9227

Real Estate Broker License - Illinois Department of Financial & Professional Regulation – Credential # 501018492

Loan Signing Agent - NNA® Approved Course – Certificate #161373731

Notary Public – Commission # 954846

SYSTEM SKILLS

Proficient w/ MS Word, Excel, PowerPoint, Outlook, Access, Lotus Notes, GSMAS90, Skyline, Netsuite, Sage, QuickBooks, WinBroker, M2K, ADPPC Payroll, Report Smith, DataPlus, Capterra, Adstage, AdRoll, Wordstream, Budzomo, Zumo, Typeform, Adobe Spark, Piktochart, Vimeo, Record It, Buffer, Hootsuite, MRED, Comshare, Canva, Encompass, Hotjar, Clicky, OptimalBlue, Trello, Asana, Chempax, Microsoft Project, Salesforce, Zoho, Zendesk, Hubspot, EDI (SPSCommerce), Agile, Jira, Zoho Project, Constant Contact, Drip, Marketo, Google Drive, Slack, Zoom, Mailchimp, AWeber, 1WorldSync, GS1 US, AMB (Accounting for Mortgage Bankers), Microsoft 365, SAP, SAGE50, Zohobooks, Peachtree and FAS, Minitab, Companion by Minitab.

MEMBERSHIPS - ACTIVE

Member of ASQ

Member of Association of Change Management Professional

Member of HRCI

Member of SAFe (Scaled Agile Inc.)

Member of National Realtors Association

Member of National Notary Association

Member of American Association of Notaries

CIVIC ORGANIZATIONS

Entrepreneur in '07 to Current

Founder of It's Our Little Story, NFP '09 to Current (renamed from It's Our Little Secret; IOLS)

Give Me A Chance Foundation, NFP '11 to September 15, 2021

