JOHN FINANCE

111 Insurance Avenue – Glenview, Illinois 99999
999-555-1212 – jfinance@mindspring.com

SENIOR FINANCE EXECUTIVE

Extensive experience in areas of corporate operations, facilities, and investments including **corporate real estate**, **strategic planning**, **administration**, **property management**, **capital appropriations**, **purchasing** and **investments**. Proven ability to recruit, motivate, and train cutting edge professionals. Mentor staff to achieve full potential. MBA – Northwestern University. Areas of Expertise:

- Mergers
- Acquisitions
- Real Estate
- Profit and Loss
- Budgets
- Margin Improvement
- Regulatory Compliance
- Project Management
- Crisis Management

PROFESSIONAL EXPERIENCE

ABC Life Insurance Company, Chicago, Illinois
Began career as Mortgage Analyst and progressed to increasingly more challenging positions. Company acquired by ABC Corp. (1992) and DEF Ltd. (1998). Publicly traded.

Vice President of General Services, 1998 – Present

Managed staff of 111 and operating budget of $9+ million (10% of company budget). Absorbed and managed mental security, shipping and receiving, mailroom services, mail/messengers and micrographic departments. Handled corporate real estate matters including purchase, sale, leasing, management, insurance, and taxes. Reported to President. 6 direct and 134 indirect reports.

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- Spearheaded $5,000,000 five-year project of major renovations to older company buildings, bringing them into conformity with the ADA, CAA, EPA regulations and current building codes.
- Saved 17% of annual taxes by negotiation of reduced tax assessments based on reappraisal of home office properties.
- Saved 33% by custodial staff and security guards' budget by outsourcing positions.

Vice President of Strategic Planning and Corporate Development, 1994–1998

Authored corporate strategic plan. Established short- and long-term goals in the areas of reengineering projects, risk return trade-off, and changes in investment policies, and capital allocations and expenditures. Provided for new products and changes in products, customer service systems and changes, buying blocks of life insurance from other companies, market research, sales and recruiting targets, expenditures for computer systems, and unit expense controls. Reported to President. 7 direct and 42 indirect reports.

- Cut expense growth rate from 12% to 15% without adverse impact on services to agents, employees, or customer by chairing cost containment task force.
- Decreased personnel 5% by devising employee reduction plan through attrition.
- Pioneered market research program, resulting in new and improved approach to agent recruiting.
- Proposed automated budget system to executive committee. Instrumental in user-friendly design, testing, and implementation of system to streamline preparation time and allow in-depth analysis as budget officer.

Vice President of Corporate Development, 1990–1994

Guided life insurance acquisitions program, coordinated subsidiary investments, and managed mortgage loan and real estate portfolios. Recommended acquisitions of industrial companies to corporate Executive Committee. Coordinated securing initial ratings from Standard & Poor=s, Moody=s, and Duff & Phelps. Hosted subsequent reviews and served as contact for industry analysts. Directed GHI Life headquarter=s relocation including site selection, design, contract negotiations, budget control, construction, and change order approval.

- Created portfolio of 13 Venture Capital Limited Partnerships, investing $1 million in each.
- Participated as Member of Due Diligence team in the purchase of GHI Life in XXXX and sale in XXXX for a $100 million profit. Served as liaison with investment bankers, tax advisors, actuarial consultants, and legal counsels.
- Signed purchase document on building of 253,500 sq. ft. on 18 acres for $27+ million, largest single investment in company history.
- Negotiated sale of property for more than authorized selling price and highest price per sq. ft. of any office building sold in the depressed city market in the previous two years.

Other Positions Held: Assistant Vice President, Corporate Development; Assistant Treasurer and Senior Investment Analyst; Assistant Treasurer, Securities Management; Mortgage Analyst.

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EDUCATION

Northwestern University, Evanston, Illinois
Master of Business Administration in Finance, 1985

Chartered Financial Analyst (CFA) Exams I and II
American Institute of Real Estate Appraisers (MAI) Exams 1A, 1B, II and VI

CERTIFICATIONS

FLMI Certification, Life Officers Management Association (LOMA)
Registered Principal, National Association of Security Dealers (NASD)

ASSOCIATIONS and AFFILIATIONS

Life Officers Management Association (LOMA)
National Association of Security Dealers (NASD)
International Association of Corporate Real Estate Executives (NACORE)

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