

**SUMMARY**

Experienced financial leader with a proven track record in increasing funding, optimizing costs, and ensuring compliance within not-for-profit healthcare and diverse industries. Expertise in Medicare Cost Reporting, grant management, financial reporting, and audits. Strong leadership skills demonstrated through successful restructuring of teams, reducing administrative costs by \$300K, and consistently delivering clean audit opinions. Skilled in providing strategic financial insights to boards and executive teams. Licensed CPA in Hawaii with experience in regulatory oversight on the Hawaii State Board of Public Accountancy. Summa Cum Laude graduate with a B.S. in Accounting & Business Management.

**WORK EXPERIENCE**

**Ko'olauloa Health Center – (Not-for-Profit)**

**Chief Financial Officer**

~3.0 years

August 2021 - Present

- **Increase Funding:** Leveraged in-depth knowledge of the CMS Provider Reimbursement Manual to dramatically increase Medicare Cost Report reimbursements from only a few hundred dollars to over \$250K annually, securing substantial new funding for the health center.
- **Cost Reduction & Efficiency:** Reduced administrative costs by \$300K by restructuring the finance and HR departments, eliminating underperforming staff, and outsourcing HR functions, resulting in significant cost savings without sacrificing operational efficiency.
- **Grant Management & Compliance:** Successfully managed Federal, State, and Private grants from application to post-award compliance, ensuring full adherence to guidelines and maximizing funding opportunities.
- **Financial Reporting & Audits:** Prepared and presented financial statements for Single Audit, consistently achieving clean audit opinions, thereby reinforcing the center's financial credibility.
- **Strategic Reporting:** Delivered critical financial and operational insights to the Board of Directors and executive team, driving informed decision-making and supporting the center's strategic objectives.
- **Leadership & Oversight:** Provided leadership and oversight to administrative staff, including medical billing, accounts payable, payroll, and HR, ensuring seamless operations and adherence to best practices.

**BD & Associates, CPAs, PLLC – (CPA Firm)**

**Staff Accountant**

~1.5 years

March 2020 – June 2021

- **Outsourced CFO Services:** Managed day-to-day accounting operations for multiple clients, providing outsourced CFO services that included financial reporting, cash flow management, and strategic planning. Prepared annual tax returns for these clients, ensuring compliance with all relevant tax regulations.
- **Tax Preparation & Compliance:** Prepared S-Corp, C-Corp, Partnership, and individual tax returns for a diverse portfolio of clients, including small business owners. Streamlined the process by integrating entity-level tax preparation with personal returns for business owners.
- **Audit & Compliance Expertise:** Conducted internal and external audits for entities up to \$100M in revenue, including casinos, ensuring strict adherence to compliance requirements set by the Gaming Control Board. This included reviewing financial statements, assessing internal controls, and providing recommendations for improvement.
- **Team Training & Development:** Trained and mentored junior staff, enhancing team capabilities and ensuring consistent service delivery across all client engagements.

**Ko'olaupia Health Center – (Not-for-Profit)**

**Staff Accountant**

~2.0 years

May 2017 – June 2019

- **Rebuilt Accounting System:** Collaborated with the controller to completely overhaul and rebuild the accounting system, implementing new internal controls and improving financial processes.
- **Audit Compliance:** Successfully caught the organization up on three years of overdue audits, ensuring compliance and reinstating timely financial reporting.
- **Internal Controls:** Designed and implemented robust internal controls to enhance financial accuracy, reduce risk, and improve overall financial management.

**HAWAII STATE GOVERNMENT EXPERIENCE**

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**Hawaii State Board of Public Accountancy – (State Regulatory Board)**

**Regulatory Board Member**

~2.0 years

February 2022 - Present

- **Regulation Oversight:** Participate in the regulation of the certified public accountant (CPA) profession in Hawaii, ensuring adherence to state licensing laws and professional standards.
- **Legislative Recommendations:** Contribute to the formulation of recommendations for regulatory changes to the state legislature, aiming to enhance the effectiveness and integrity of the profession.
- **Licensing:** Review and approve licenses for new CPA applicants, maintaining rigorous standards for entry into the profession and ensuring compliance with state requirements.

**PROFESSIONAL LICENSES**

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**CPA License 6023 – (State of Hawaii July 2021)**

**EDUCATION**

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**Brigham Young University – Hawaii**

**Bachelor of Science – Accounting & Business Management Double Major**

- **Academic Excellence:** Graduated Summa Cum Laude with a 3.9 GPA while working full-time and maintaining scholarships, demonstrating exceptional time management and dedication.
- **Work-Life Balance:** Successfully balanced the demands of full-time work, marriage, and fatherhood, earning a promotion at work and excelling academically throughout university.
- **Competitive Achievement:** Achieved 2nd place in a university-wide accounting case competition, showcasing strong analytical skills and a commitment to excellence in a competitive environment.