

# Steven J. Meier, CPA, MBA, CGMA

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## CAREER ADVANCEMENT

**WORKNET PINELLAS, INC. dba CareerSource Pinellas. Clearwater, FL** **2018-Present**

*The CareerSource Pinellas mission is to build the talent pipeline for today and the future by providing easy access to workforce solutions for Pinealls County.*

### **Interim Chief Executive Officer and Chief Financial Officer**

- Improved morale and culture of the organization by implementing employee engagement committee, implementing diversity committee, hiring/filling critical positions, improving transparency and communication and realigned teams to support program fundamentals.
- Facilitated 30 board, committee, and board-related meetings to fulfill governance functions. In addition, led organization and stakeholders in meetings with Ernst Young relating to REACH Act realignment study.
- Oversaw the conclusion of the USDOL's Compliance Review. CareerSource Pinellas was responsible for paying back \$1,862,990 without any exposure to the taxpayers of Pinellas County.
- Achieved program expectations by meeting/exceeding 17 of the 18 U.S Department of Labor "Performance Indicators" for the Workforce Investment and Opportunity Act (WIOA) Program Year ending June 30, 2022.
- Received a base-line score of B+ in accordance with the REACH Act Letter Grade requirements.
- 75% of customers enrolled in WIOA Adult, Dislocated Worker, and Youth training programs successfully ended their training activities and over 40% of WIOA customers have exited the program with employment.
- Strengthened partnerships and successfully facilitated the integration of the organization into the fabric of the community by maintaining 42 operational and strategic partnerships, to leverage resources to expand and enhance services through One-Stop Operator.
- Worked with outside marketing firm to create a comprehensive marketing and communications plan to support external communications, optimize social media and create brand and program awareness.

### **Chief Financial Officer**

- Designed and implemented a new finance organization for a \$12 Million organization. Developed standardized processes and knowledge systems to ensure consistency in application.
- Manage grants awarded by Florida Department of Economic Opportunity to ensure that funds are spent in accordance with federally accepted cost principles.
- Continually develop and improve financial reporting to ensure full transparency for all stakeholders.
- Successfully work with U.S. DOL to negotiate organization's annual indirect cost rate.
- Prepare and present organization's annual budget to Board and Directors and Board of County Commissioners.
- Coordinated successful annual audits of organization's financial statements and 401K plan.

**PARADY FINANCIAL GROUP, INC, The Villages, FL****2014-2017**

*A \$12 Million privately owned financial services firm that has helped thousands of retirees, and people nearing retirement age, achieve peace of mind by designing personalized retirement planning strategies.*

**Chief Financial Officer**

- Responsible for all accounting and financial functions for nine different legal entities affiliated with Parady Financial Group, Inc. Functions included, but not limited to, payroll, accounts payable, cash management, commission monitoring, monthly and annual reporting and variance analysis.
- Liaison with Bank of America, SunTrust and Regions Bank to manage all cash and financing needs of this growing organization. Secured over \$2.5 Million in term loans, \$500,000 Line of Credit and over \$200,000 credit limit for company credit cards (Visa, MasterCard and American Express).
- Facilitated personal mortgage refinance and Home Equity Lines of Credit (HELOC) for two residences, sale of former residence and purchase of fishing cabin for owner of Parady Financial Group, Inc. Total value of personal loans finalized was in excess of \$3 Million.

**DAVE THOMAS FOUNDATION FOR ADOPTION, Columbus, OH****2004-2014**

*The Dave Thomas Foundation for Adoption is America's only nonprofit public charity dedicated exclusively to finding permanent homes for the more than 100,000 children waiting in foster care to be adopted.*

**Senior Director, Finance**

- Member of leadership team that drove growth of the Foundation through execution of the strategic plan and other initiatives. During my tenure, the Foundation grew from \$7,000,000 in revenues to over \$27,000,000.
- Responsible for all financial aspects and analysis of \$27 Million national 501(c)3 foundation including annual budgeting, forecasting, variance analysis, preparation of annual and month-end reporting, banking relationships, financial presentations to the board of trustees, state charitable solicitation requirements (46), annual audit process and preparation of Form 990.
- Oversaw Foundation's operating investments of approximately \$10.8 Million and 403b retirement plan assets of \$1.4 Million. Managed the Investment Advisory Committee to maximize returns while managing the downside risk associated with market uncertainties. Operating investments increased over 100% during my tenure.
- Contract Administration for more than 200 contracts with both public and private grantees and grantors in all fifty states, the District of Columbia and Canada. Resolved and coordinated all contract issues with grantees/grantors and outside counsel.
- Designed and implemented Foundation's finance/accounting processes utilizing Blackbaud's Financial Edge and affiliated modules.
- Managed Foundation's benefits and risk management program. Working with outside insurance broker, restructured medical insurance program that saved the Foundation more than \$150,000 over five years.

**COLUMBUS JEWISH FEDERATION, Columbus, OH****2003-2004**

*Not-for-profit organization raising in excess of \$8 Million annually that enriches Jewish identity and enhances the quality of Jewish life locally in Columbus, in Israel, and throughout the world.*

**Director of Finance & Administration**

- Redesigned accounting function, including chart of accounts, and streamlined accounting processes to reduce accounting close and monthly reporting to less than 2 weeks (50% reduction).
- Facilitated and managed a diverse group of individuals from affiliated not-for-profit agencies to examine current health insurance program and investigate ways to reduce costs, offer benefits that were important to the employees, all while maintaining a competitive level of benefits.

**KOCH INDUSTRIES INC.****1997 - 2003**

*Second largest privately held company in the United States with revenues in excess of \$120 Billion. Koch has extensive holdings in oil and gas, chemicals, minerals, and securities. Other operations include commodity trading and transport, asphalt marketing, and the manufacture of chemical technology equipment for processing industries.*

**Chief Financial Officer and Treasurer**, Koch Waterproofing Solutions, Reynoldsburg, OH (Sold to Tremco, Inc. effective March 31, 2003)

- Designed and implemented a new finance organization for a \$30 Million division. Transitioned all accounting and IT support for the company from Group Headquarters in Wichita, KS. Developed standardized processes and knowledge systems to ensure consistency in application. Hired, managed and developed accounting and IT staff of 4 individuals.
- Streamlined accounting and IT processes by reducing accounting close from two weeks to 4 days and providing financial results and management reports within 4 days.
- Facilitated divestiture of company from Koch Industries and assisted in transition of company to new owner.

**Manager, Financial Reporting and Analysis**, Koch Chemical Company, Wichita, KS

- Managed and developed accounting staff of 7 individuals, responsible for ensuring sales were recorded (over \$1 Billion annually), receivables paid and monthly reporting completed in a timely and accurate manner.
- Initiated the restructuring and integration of Chemical accounting processes and systems to take advantage of synergies between divisions. As a result of the integration, five positions were eliminated, saving the company over \$325,000 per year.
- Participated on due diligence team for \$2 Billion acquisition and assisted in identifying list of items that would impact valuation of purchase price. Subsequent to acquisition, set up ledgers for new entities and managed the equity accounting for this non-consolidated entity. Within 12 months, managed the conversion of these various legal entities to Oracle Financial Software.
- Provided financial support on a cross-functional team that analyzed viability of an underperforming division comprising a net book value of \$30 million. Analysis performed and Point of View developed, supported decision to exit business.

**HOECHST CELANESE CORPORATION****1989 – 1997**

*A \$7 Billion Fortune 100 Corporation that manufactures a diversified line of chemicals, fibers, advanced materials and life sciences products. An affiliate of the Hoechst Group, a \$36 Billion global conglomerate.*

**Senior Financial Analyst**, Polyester Intermediates, Wilmington, NC

- Designed and implemented all accounting and financial processes for new product line in Polyester Intermediates portfolio. Improved communications and workflow among 4 locations. Ultimately responsible for all financial aspects and analysis of \$200 Million product line.

**Supervising Senior Internal Auditor**, U.S. Corporate Headquarters, Bridgewater, NJ

- Managed, conducted and trained auditors on financial and operational audits at both manufacturing and office locations in the United States, Canada and Mexico.
- Uncovered misappropriations of funds in excess of \$500,000 and \$100,000.

**SCIENCE MANAGEMENT CORPORATION, Basking Ridge, NJ****1987 - 1989**

*\$70 Million publicly traded international professional services firm providing management consulting, computer consulting, recruiting services, and environmental consulting and engineering.*

**Manager, Corporate Accounting**

Supervised and developed Corporate accounting staff, including payroll, general accounting and accounts payable. In addition, reviewed and supervised monthly closing and consolidation. Prepared internal management reports and SEC reports (10K and 10Q). Backed-up cash management desk.

**PRICE WATERHOUSE, Morristown, NJ****1983 - 1987****Senior Auditor**

Supervised audit field work for clients in the chemical, pharmaceutical and service industries; performed audits for not-for-profit organizations; trained audit staff. Clients: Allied-Signal, Warner Lambert, National Starch and Chemical, Martindell-Hubbell, Science Management and Upper Raritan Watershed Association.

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**EDUCATION**

- University Of North Carolina Wilmington - Masters in Business Administration (1997)
- Rider College, Lawrenceville, NJ - B.S. in Commerce, Major in Accounting (1983)

**PROFESSIONAL CERTIFICATIONS / AFFILIATIONS**

- Certified Public Accountant, Florida
- Chartered Global Management Accountant
- Member American Institute of Certified Public Accountants
- Member The Financial Executives Networking Group