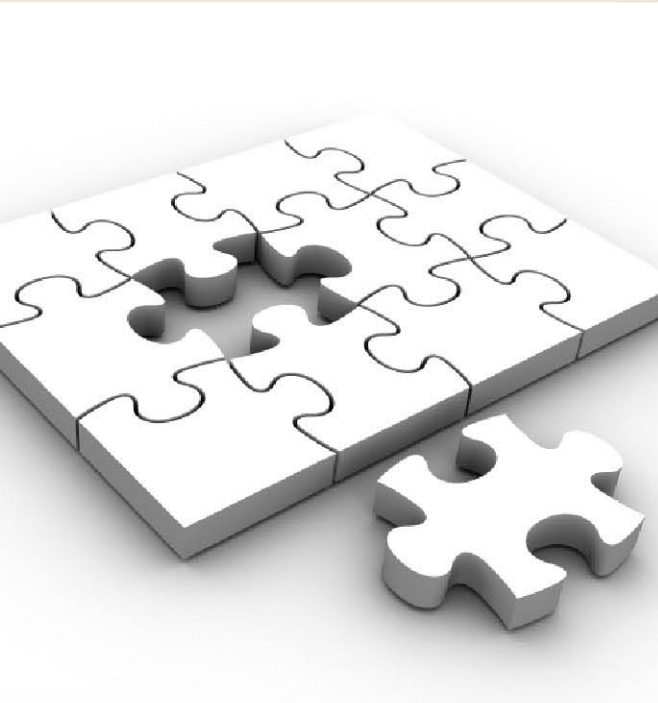


# CANDIDATE LISTING





## CANDIDATE LISTING

Forrer & Associates is the preeminent executive search firm in the markets that we serve. We have earned this reputation by understanding the different needs and goals of our clients, which consist of Fortune 500 and other publicly traded companies, privately-held companies, private equity firms and their portfolio companies. We also understand the career goals of our candidates, the career-minded professionals that we provide to our clients through our executive search and interim consulting services. We place professionals from the executive to senior level.

## PARTIAL CANDIDATE LISTING

The following list of candidate profiles is only a partial representation of qualified professionals currently available for your human capital needs. The candidates are grouped into areas of specialty.

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## CANDIDATE LISTING

### ACCOUNTING PROFESSIONALS

#### ACCOUNTING

- #1001 Accounting - Chief Accounting Officer** - CPA with Big 4 audit and public company experience.
- Responsible for all aspects of accounting and reporting for domestic and international operations of a multi-national public company including SEC reporting, budgeting, forecasting and ad hoc reporting and bid analysis.
  - Participated in one public equity offering filed on Form S-1 and one public debt offering filed on Form S-4.
  - Industry experience includes services, technology, telecommunications and media.
- #1002 Accounting - Vice President** - CPA with Big 4 audit and Fortune 500 experience.
- Responsible for accounting, financial reporting, and financial analysis at a large division within a Fortune 500 company.
  - Manage and coach staff of over 10 professionals.
  - Industry experience includes financial services and technology.
- #1003 Accounting - Controller** - CPA with Big 4 audit and public company experience.
- Manage all financial and managerial accounting functions for the parent company and its subsidiaries, including the direct supervision of the Assistant Controller, Payroll/HR Manager, Accounting Manager, and the Finance IT Administrator.
  - Implement and administer policies and procedures to ensure financial integrity throughout the organization including stock-based compensation SFAS 123R, and best practices of Sarbanes-Oxley.
  - Manage financial reporting process including the preparation and review of SEC required filings 10K, 10Q and SEC comment letter responses.
- #1004 Financial Reporting Senior Manager** - CPA with Big 4 public accounting and Fortune 500 experience. U.S. GAAP and IFRS expertise.
- Responsible for all aspects of external reporting including compilation of MD&A and footnotes as well as filing of forms 10K and 10Q.
  - Led the IFRS implementation for the US subsidiary.
  - Industry experience includes manufacturing, industrial and distribution.
- #1005 Accounting - Supervisor** - CPA, MAC with Regional firm audit and large public company experience.
- Review and analyze financial information, analyze variances from budget, and perform estimates and complex calculations.
  - Lead a large-scale risk assessment and control integration project for a global ERP system implementation.
  - Industry experience includes distributions, beverage and manufacturing.
- #1006 Accounting - Senior** - Big 4 CPA with multi-billion dollar public company experience.
- Responsible for month end close and financial statement preparation as well as coordinating with the company's external auditors to complete all SEC reporting and filings (i.e. 10K, 10Q, 11K and various 8K's).
  - Assist Controller and Director of Financial Reporting in managing special company-wide projects including IFRS phase I assessment and reporting unit valuation.
  - Industry experience includes manufacturing, real estate, financial services, construction, and technology.

## CANDIDATE LISTING

### AUDIT PROFESSIONALS

#### FINANCIAL AUDIT

**#1007 Big 4 Audit Senior Manager** - CPA serving a portfolio of large domestic and international publicly traded clients.

- Review annual, quarterly and pro-forma financial statements of SEC filings 10-K and 10-Q. Advise on other SEC filings including S-4 registration statements.
- Expertise in U.S. GAAP and IFRS including working in overseas office for 2 years.
- Industry experience includes manufacturing, consumer products, pharmaceuticals and distribution.

**#1008 Big 4 Audit Manager** - CPA, MBA serving both public and private clients.

- Coordinate and manage financial statement audits for public and private companies in accordance with GAAP, GAAS and regulations of the PCAOB. Review annual, quarterly and pro-forma financial statements of SEC filings 10-K and 10-Q.
- Research and advise on a variety of technical issues including valuation of securities, pensions, leases, capitalized software, revenue recognition, business combinations and other complex issues.
- Assist clients in complying with the Sarbanes Oxley 404 Act which includes performing risk assessments, identifying and documenting significant business processes, identifying relevant financial statement assertions, identifying and testing significant controls and assisting in the remediation of controls.

**#1009 Big 4 Audit Manager** - CPA, MAC serving publicly traded clients.

- Perform financial statement audits in accordance with US GAAP and the reporting requirements of the SEC for public and private clients.
- Exceptional performer who is a top rated individual each evaluation period.
- Industry experience includes mortgage banking, mutual funds, manufacturing.

#### IT AUDIT

**#1010 Big 4 IT Audit Senior** - CISA, SAP expert serving Fortune 500 clients.

- Responsible for planning, scoping, and executing control assessments, detailed security assessments, and automated controls reviews.
- SAP expertise includes executing multiple complex Sarbanes Oxley security and control assessments over SAP; providing recommendations for IT general controls and key business process controls; segregation of duties and restricted access during SAP security reviews; and providing recommendations on configurable controls within various SAP modules and processes.
- Significant experience in assessing controls, configurations, and security within SAP (FI, MM, SD, Basis), Oracle, SQL, and DB2 databases, AS/400, UNIX and Windows operating systems.

**#1011 Big 4 IT Audit Senior** - CISA serving domestic and international publicly traded clients.

- Responsible for identifying and documenting key risks, control objectives and activities, scoping controls testing and communicating control implications and audit responses to audit teams.
- Led and managed several types of projects, primarily based around business process and IT general controls, including SOX and JSOX, SAS 70s, and data privacy attestations.

## CANDIDATE LISTING

### FINANCIAL REPORTING AND FINANCIAL SYSTEMS PROFESSIONALS

#### FINANCIAL REPORTING

- #1012 Controller** - CPA with Big 4 public accounting and large public company experience.
- Corporate executive with responsibility for accounting and controllership issues including SEC reporting including 10-Ks, 10-Qs and response letters to SEC comment letters.
  - U.S. GAAP and IFRS expert responsible for technical accounting matters across multiple businesses. Advice on all types of issues and transactions including revenue recognition, acquisitions, stock compensation, CSAs and structured financing.
  - Industry experience includes manufacturing, and technology.
- #1013 Financial Reporting Vice President** - CPA with Big 4 public accounting and external financial reporting experience.
- Oversee SEC filing forms 10-Ks and 10-Qs. Oversee preparation of all schedules included in the filings, disclosure checklists, MD&A analysis and coordination of legal, treasury, business and auditor data/review. Understand existing disclosures and research new and applicable accounting pronouncements.
  - Responsible for accounting issues including revenue recognition, impairment accounting, discontinued operations, held for sale treatment, cash flow statement issues, stock option repurchases and FSP APB 14-1 convertible debenture accounting.
- #1014 Financial Reporting Director** - CPA, U.S. GAAP and IFRS expert with Big 4 public accounting and Fortune 500 financial reporting experience.
- Responsible for all aspects of external reporting including compilation of MD&A and footnotes as well as filing of forms 10K and 10Q.
  - Led the IFRS implementation for the US subsidiary.
  - Industry experience includes services, manufacturing and distribution.
- #1015 Financial Reporting Senior** - Big 4 CPA with global financial reporting experience.
- Prepare financial information for inclusion in 10K and 10Q and maintain schedules to document detail over areas including debt, fixed assets, derivatives, and stock compensation.
  - Supervise one reporting analyst.
  - Industry experience includes financial services, manufacturing, and logistics.

#### FINANCIAL SYSTEMS

- #1016 Financial Systems Manager** - MBA with Fortune 500 Hyperion administrator experience.
- Hyperion Certified Developer (HCD) - Hyperion System 9 BI + Analytics 9.0.
  - Responsible for the functional design of Hyperion Planning, Hyperion Reports and Essbase to support the finance community.
  - Administrator expertise with Hyperion Essbase and Great Plains. Significant SAP functional, administrator and end user experience including core team member of the segment implementation team for the SAP General Ledger System.



## CANDIDATE LISTING

### CORPORATE FINANCE / STRATEGY PROFESSIONALS

#### INVESTMENT BANKERS

**#1017 Associate** - J.P. Morgan Securities & Stanford MBA

- Responsible for the origination, structuring, underwriting and syndication of leveraged finance transactions for both corporate and financial sponsor clients, often in the context of "one-stop" bank/bond executions
- Executed over \$39 billion of large and mid size transactions
- Industry experience includes technology, media & telecommunications

**#1018 Associate** - UBS Investment Bank & Harvard MBA

- Broad exposure to M&A transactions, including buy-sides, sell-sides, mergers and recapitalizations for public and private companies
- Industry experience includes industrials and manufacturing

**#1019 Analyst** - Goldman Sachs & Co.

- Participated in all aspects of deal execution for M&A projects, including financial modeling, preparation of offering memoranda, investor presentations, due diligence activities, and evaluation of bid proposals.
- Industry experience includes technology, media & telecommunications

#### MANAGEMENT CONSULTANTS

**#1020 Engagement Manager**- McKinsey & Company & Kellogg MBA.

- Global experience includes growth/market sizing, marketing, supply chain in retail and consumer products.
- Create persuasive, fact-based business cases and create cohesive, working cross-functional teams to effectively execute against the business plan.

**#1021 Manager** - Deloitte Consulting and Vanderbilt University.

- Provide business strategy development, competitive landscape assessment, merger and divestiture planning and execution, merger synergy planning and tracking, financial modeling and analysis and business process redesign.
- Industry experience includes manufacturing, airlines, consumer goods, communications and professional services.

**#1022 Project Lead** - Bain & Company & Harvard MBA.

- Results-oriented manager with strong problem-solving, execution, and communication skills and ability to build trust-based client/customer relationships. Deep expertise in strategy, R&D, and analytics.
- Industry experience includes manufacturing, technology, software and healthcare.

**#1023 Business Analyst** - The Boston Consulting Group and Company.

- Provide strategic and operational advice to clients.
- Responsibilities include financial modeling, market sizing, manipulation of large data sets.
- Industry experience includes technology, healthcare and services.

## CANDIDATE LISTING

### CORPORATE FINANCE PROFESSIONALS (CONTINUED)

#### CORPORATE DEVELOPMENT AND STRATEGY

- #1024 Director Corporate Development** - Stanford MBA.
- Led and manage the acquisition process, including deal presentations, financial modeling, due diligence, financing, structuring, negotiations and integration.
  - Industry experience includes financial services, technology, software.
- #1025 Manager Corporate Development** - Emory University MBA.
- Manage the acquisition process, including deal presentations, financial modeling, due diligence, financing, structuring, negotiations and integration.
  - Industry experience includes financial services and business services.
- #1026 Analyst Corporate Development** - Duke University MBA.
- Participate in aspects of the acquisition process including target identification, LOI negotiation, due diligence, purchase agreement negotiation, transaction closing and preliminary integration planning.
  - Industry experience includes manufacturing and services.

#### FINANCIAL PLANNING AND ANALYSIS

- #1027 Finance Vice President** - Top 20 MBA with large public company experience.
- Responsible for financial management of multi-billion dollar division, develop financial models for sensitivity analysis, and prepare and present monthly financial results to key executives.
  - Recognized for best practice implementation of company-wide metrics/data collection system during larger merger integration.
  - Industry experience includes retail, financial services, and manufacturing.
- #1028 Finance Senior Manager** - MBA with Fortune 50 multi-national company experience.
- Provide strategic finance support and guidance to the CFO on programs designed to improve efficiency of operations.
  - Manage all budget, close, and reporting activities for a \$4.5 billion dollar expense division.
  - Industry experience includes technology, automotive, and logistics.
- #1029 Finance Manager** - MBA with public experience.
- Direct the analytical functions for category management and operations teams, building framework & procedures and determining tools necessary for our eight business analysts to meet the weekly, monthly, and ad-hoc reporting/analysis needs of both teams.
  - Direct the ad-hoc analyses of the business analysts in key business areas such as promotions, sales/margin, and labor to identify trends and opportunities. Communicate findings to category management, marketing, and operations
  - Industry experience includes services and retail.
- #1030 Finance Senior** - Top 20 MBA with large public company FP&A experience.
- Construct financial forecasting model to evaluate the capital expenditure program.
  - Provide financial modeling and due diligence assistance and evaluate financial analyses for presentations to executive management.
  - Industry experience includes consumer products, manufacturing and beverage.



## CANDIDATE LISTING

### TAX PROFESSIONALS

#### COMPLIANCE

**#1031 Tax Senior Manager** - CPA, MAC with Big 4 tax experience.

- Effectively project managed staff ranging from one to five team members to prepare federal and state income tax returns and foreign informational reporting for large consolidated C-corporations with varying tax profiles and technical issues.
- Led the preparation of ASC 740 (formerly SFAS 109) income tax provisions as well as the review of provisions in the audit capacity for multiple corporate clients.
- Led several FIN 48 implementation projects involving identification and quantification of uncertain tax positions.

**#1032 Tax Manager** - CPA, MAC with Big 4 and public company tax experience.

- Responsible for managing tax staff. Review federal, state and local tax returns for C Corporations, S Corporations, Partnerships and Limited Liability Companies.
- Coordinate the preparation of the tax provision in accordance with FASB 109 with the tax accounting group.

**#1033 Tax Senior** - CPA, MAC with Big 4 tax experience.

- Prepare and review federal and state tax compliance for C corporations and partnerships.
- Assist in the preparation of the tax provision in accordance with FASB 109.
- Calculate, prepare and review quarterly estimated payments and extension payments using CorpTax and Superform.

**#1034 Tax Senior** - CPA, MAC with Big 4 and large corporate tax experience.

- Responsible for the preparation of corporate and partnership tax returns, as well as the computation of depreciation on fixed assets & tax reconciliations.
- Prepare and maintain various schedules and work papers including apportionment factors, fixed asset reconciliations and NOL schedules.
- Communicate timely with other divisions of company to gather information for the preparation of federal, state, and local tax returns. Respond, research, and follow up on income tax notices.

**#1035 Tax Senior** - CPA, CFA, MAC with Big 4 tax experience and family office experience.

- Prepare and review individual, expatriate, foreign national, partnership, and S corporation tax returns.
- Provide tax strategy for high net worth individuals and family offices.
- Assisted in the preparation of a 100-page estate plan for founder of public company.

**#1036 Tax Senior** - CPA with Big 4 and large corporate tax experience.

- Responsible for preparation and review of compliance, including federal, state and local returns, and method changes.
- Technical issues researched include ASC 740, Tax Accounting Method Changes, Fixed Assets, Conservation Easements, Charitable Contributions, and UNICAP.

## CANDIDATE LISTING

### TAX PROFESSIONALS (CONTINUED)

#### CONTROVERSY

- #1037 Tax Director** - CPA, JD with Big 4 and Fortune 500 corporate tax experience.
- Responsible for technical support for tax reserves, federal and state audits, appeals and litigation, reportable transaction disclosures and legislative developments.
  - Extensive experience with federal tax research and planning.
  - Manage large team of accountants and attorneys.
- #1038 Tax Director** - CPA, JD, LLM with Big 4 and corporate tax experience.
- Responsible for coordination, handling and negotiation of all tax audits and appeals.
  - Manage federal, state and local tax planning such as reviewing the structure of business transactions to minimize federal tax expense.
  - Liaison with business leaders on all tax matters.
- #1039 Tax Director** - JD, LLM with Big 4 and corporate tax experience.
- Responsible for coordination, handling and negotiation of all tax audits and appeals. Negotiate various settlements of multi-year federal and state tax audits and secure significant tax refunds.
  - Provide legal, technical, and structural advice for domestic and international mergers, acquisitions, dispositions, and corporate restructuring.
  - Coordinate with business leaders on all tax matters.
- #1040 Tax Director** - JD with Big 4 and public company tax experience.
- Manage audit defense function for income-franchise, sales and use and business license/occupation taxes.
  - Identify and prepare refund claims across all tax types.
  - Spearhead development of multi-state tax billing policy and serve as tax lead on all internal product development teams.
- #1041 Tax Director** - CPA with Big 4 and state department of revenue experience.
- Big 4 experience with sales and use compliance, audit defense, due diligence, taxability studies, refund analysis, effective tax rate negotiations, and voluntary disclosure agreements.
  - State department of revenue experience includes establishing and clarifying sales and use tax policy through the drafting and issuance of regulations, policy statements, and information bulletins. Also, Mediate sales and use tax audit disputes by facilitating taxpayer hearings, and drafting formal rulings as applicable.
  - Manage team of sales and use tax policy analysts and oversee the everyday operations of the sales and use tax policy group.
- #1042 Tax Senior Manager** - JD with Big 4 and state department of revenue experience.
- Extensive experience in state income and franchise tax controversies, including audits, protests, and administrative appeals.
  - Secure administrative letter rulings, opinion letters and tax refunds through proactive generation of state tax controversy positions.
  - Other accomplishments include developing tax policy with state tax commissioner.

## CANDIDATE LISTING

### TAX PROFESSIONALS (CONTINUED)

#### FINANCIAL REPORTING

- #1043 Senior Director Tax** - CPA with Big 4 and large corporate tax experience.
- Extensive experience with financial accounting for income taxes for multinational publicly traded corporations.
  - Coordinate and perform technical review of annual and quarterly income tax provision in accordance with SFAS 109, including review of financial reporting disclosures.
  - Analyze and review tax purchase accounting, SFAS 141/142 impairments, and APB 23 requirements. Review of forecasted effective tax rates, tax contingency reserves, discrete tax adjustments, and valuation allowance implications.
- #1044 Tax Senior Manager** - CPA, MAC with Big 4 tax experience.
- Manage teams to prepare federal and state income tax returns and foreign informational reporting for large consolidated C-corporations with varying tax profiles and technical issues.
  - Led the preparation of ASC 740 (formerly SFAS 109) income tax provisions as well as the review of provisions in the audit capacity for multiple corporate clients.
  - Led several FIN 48 implementation projects involving identification and quantification of uncertain tax positions.
- #1045 Tax Senior Manager** - CPA with Big 4 and corporate tax experience.
- Responsible for FASB 109 income tax accounting and SOX compliance, including preparation of quarterly and annual income tax provision, deferred income tax account analysis and preparation of the tax footnote to the corporate annual report.
  - Review U.S. and international tax compliance.
  - Plan and direct tax audits including international, federal, state & local income, franchise, property, sales tax, GST, PST, VAT and business credits.
- #1046 Tax Manager**- CPA with Big 4 and corporate tax experience.
- Review FAS 109 and FIN 48 reporting, 404 compliance, and internal reporting including review of quarterly and annual income tax provision, deferred income tax account analysis and preparation of the tax footnote to the annual report.
  - Review of federal, state and international corporate tax returns.
  - Manage special projects including tax research and departmental process enhancements.
- #1047 Tax Senior** - CPA with Big 4 and large corporate tax experience.
- Responsible for review and preparation of federal, state and international returns.
  - Prepare FAS 109 and FIN 48 reporting, 404 compliance and internal reporting including the tax footnote.
  - Technical issues researched include the following: ASC 740, Tax Accounting Method Changes, Fixed Assets, Conservation Easements, Charitable Contributions, UNICAP

## CANDIDATE LISTING

### TAX PROFESSIONALS (CONTINUED)

#### RESEARCH & PLANNING PROFESSIONALS

- #1048 Tax Director** - CPA, MST with Big 4 and large public company corporate tax experience.
- Manage corporate tax department including U.S. and international income, sales, payroll, and property taxes.
  - Advise senior management on tax implications of major business transactions. Utilized tax planning techniques to achieve both tax deferrals and permanent tax savings.
  - Participate in structuring acquisitions and performed due diligence reviews.
- #1049 Tax Director** - CPA, MAC, MST with Big 4 and public company tax experience.
- Responsible for planning and tax minimization strategies for mergers, acquisitions, and dispositions.
  - Extensive experience with tax purchase accounting, SFAS 141/142 impairments, and APB 23 requirements.
  - Coordinate and review US and foreign country tax implications of transfer pricing policies and cash repatriation strategies.
- #1050 Tax Senior Manager** - CPA, JD with Big 4 and corporate tax experience.
- Responsible for tax technical and planning expertise on acquisition, merger/de-merger and other business development projects. Propose tax favorable structures to minimize potential tax costs.
  - Responsible for international tax planning issues including restructuring, repatriation issues, foreign tax credit analysis, and transfer pricing.
  - Other special projects include tax process redesign and optimization.
- #1051 Tax Senior Manager** - CPA, JD with Big 4 and corporate tax experience.
- Responsible for the identification of international tax opportunities through strategy and planning of international restructuring projects and world-wide tax reduction projects.
  - Manage FIN 48 related to international issues on U.S. return.
  - Provide analysis of new international tax legislation.

#### TAX SYSTEMS

- #1052 Senior Manager** - JD with Big 4 and corporate tax experience.
- Responsible for tax department operational reviews including Sarbanes Oxley and tax risk management reviews on a tax department basis.
  - Expertise in tax provision (FAS 109) software implementations.
  - Other tax systems administrator responsibilities include managing software applications to facilitate all compliance and handling IRS Information Document Requests (IDR's) which require technological assistance and coordination with IRS Computer Audit Specialists.
- #1053 Senior Manager** - JD with Big 4 tax experience.
- Certified PeopleSoft Project Lead with additional certifications in various third-party sales & use and other various tax compliance software systems.
  - Areas of expertise include business process design, tax automation reengineering, and implementation project management.
  - Responsible for all phases of an implementation from evaluation and recommendation to configuration and interfacing tax software with ERP.



## CANDIDATE LISTING

### Areas In Which We Can Provide Executive Search or Interim Consulting Services

#### Accounting

- General Ledger
- Month & Year End Close

#### Audit

- Financial, Operational & IT
- Sarbanes-Oxley (SOX) Compliance

#### Corporate Development & Strategy

- Valuations, Mergers & Acquisitions
- Growth & Marketing Strategy
- Segmentation & Process Design

#### Financial Planning & Analysis

- Management Reporting
- Strategic Financial Analysis

#### Financial Reporting

- External (SEC) Reporting
- Internal (GAAP) Reporting
- International Financial Reporting Standards (IFRS)

#### Financial Systems

- Financial System Administration
- Financial System Implementation

#### Tax

- Compliance
- Controversy
- Financial Reporting
- Research & Planning
- Tax Systems

#### For More Information on these Candidates:

If you are looking for additional accounting, finance or tax professionals for your company or need to compliment an existing team for a specific project or period of time, contact [Forrer & Associates](http://www.forrerusa.com) today. One of our consultants will arrange for an appointment and you'll see first-hand why we're the preeminent executive search firm in the markets that we serve.