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Chief Financial Officer Specializing in Travel and Tourism

Compliance • Transparency • Partner/Sponsor Communications • Private/Public Partnerships • Change Management

Elevating Organizations to the Highest Standards by Propagating Transparency; Acting as Eyes, Ears, and Counsel to CEO and BOD; and Actively Engaging Employees in Change

Lead Finance, Operations, HR, and IT activities for organization that has helped the travel industry grow YOY in the last 5 years, even as other industries and overall economy consistently shrank.

Each year, Florida tourism:

- ☑ Creates thousands of new jobs
- ☑ Injects ~\$90B into the state economy
- ☑ Generates ~\$6B in local and state taxes



Tour Florida earned 91% approval rate from corporate partners in 2007 and is on track to reach goal of 95% in 2013 as we participate in state-regulated reauthorization of state and private fiscal support through the Tourism Marketing Act (Florida's equivalent to the US Congress Travel Promotion Act).

PROFESSIONAL EXPERIENCE & CONTRIBUTIONS

TOUR FLORIDA, Public/private partnership with a mission to grow tourism in Florida. \$50M budget.

2004–Present

Senior Director of Finance, Human Resources, and Information Technology

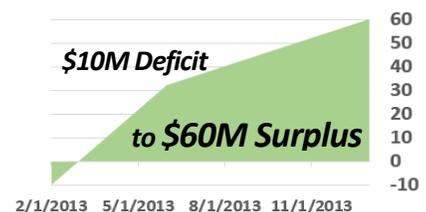
Hired to support CEO as organization navigated massive changes in external politics and internal culture. Advanced rapidly, providing leadership where it was needed in operations, finance, and HR. Currently hold executive accountability for all finance activities. Also oversee HR and IT. 10 staff reports.

EXAMPLES OF FISCAL AND OPERATIONAL LEADERSHIP:

Collaborated with CEO to take Tour USA from \$10M deficit to \$60M surplus.

Worked hand in hand with CEO of Tour Florida (interim Tour USA CEO) to aid Tour USA in turning finances around. Served as interim CFO. During this 6-month period, also fulfilled ongoing duties at Tour Florida, including fiscal year closeout and audit.

- Supported CEO outreach to legislators with proof of fiscal improvements.
- Enabled receipt of maximum annual match of \$100M from the Dept. of Commerce.
- Counseled stakeholders on strategy for fiscal improvements and cultural change.
- Executed financial and compliance end of 33% layoff at Tour USA.
- Worked closely with Board of Directors to rebuild infrastructure.



Turned around finance department, redressing longstanding operational and cultural shortfalls.

Replaced outgoing director of finance just ahead of the year-end audit and board review. Inherited significant accounting errors. There were no finance personnel, and cross-functional team was not equipped to manage budgeting and reporting functions for their groups. D&O insurance was lapsed, and the general ledger had not been reconciled for 6–12 months.

- Created transparency from chaotic operations in one month to retain unbroken company record of unqualified audits and begin a new unbroken record of no written management items that remains intact.
- Implemented accountability for department heads, creating new protocols such as approving billing from vendors, putting contracts in place before work begins. Cut A/P cycle from 90 days to 30 days.
- Uncovered \$1.4M in over-billing by partners and vendors and improved accuracy of both vendor billing and internal manager oversight by hiring outside compliance firm to review all A/P invoices.
- Elevated alliances with international contractors to level of true partnership, personally visiting each of the 12 locations.

Please see next page for details on change management, IT oversight, and scaling to 600% growth...

EXAMPLES OF FISCAL AND OPERATIONAL LEADERSHIP, CONTINUED (TOUR FLORIDA)

Effected cultural change by rewarding desired behavior and giving staff the opportunity to collaborate where possible.
Between lightning-fast growth and deep-rooted accounting problems, there was much opportunity for improvement. However, tenured employees were used to the legacy business model.

- Reformed corporation-wide phenomenon of inflated travel expenses by greatly expanding travel guidelines to be more comprehensive on allowable travel and expenses. Gained buy-in from department heads by getting their input based on their real-world travel experiences.
- Achieved compliance from managers who were resistant to changes such as performing financial due diligence for their departments. Worked with executive team to incorporate compliance into the annual review process.

Brought tech and business together, mentoring communications-challenged IT director into an effective leader.

Assumed oversight of IT operations when communications challenges arose between the executive team and the IT director.

- Elevated communications of IT director, eliciting his concerns and working with him one-on-one to improve his interpersonal skills.
- Added element of choice, establishing new best practice for IT director of presenting 2 or more solutions to technology challenges, along with cost/benefits analysis, so that executive team could be more involved in decisions. Previously, only a single solution was presented, without the information business units needed to understand it.
- Transformed effectiveness of director with executive team. Within 6 months, director's improved performance was recognized by CEO. Two years later, IT director is considered an invaluable team member.
- Facilitated IT's organizational reach, effectiveness, and cost containment. Internal, domestic, and 12 international websites have been revamped or built from scratch; \$400K infrastructure upgrade has been completed to support consumer-facing initiatives; and organization's first mobile app has been produced—**all by internal team members.**

**Saved \$2M
by insourcing IT**

Entered newly created operations manager role to meet ROI and scalability needs as budget jumped 600%.

When new legislation resulted in budget growth from \$7.5M to \$50M, the challenge was to fulfill the mandate to increase tourism 5-fold while maintaining overhead of ≤15%.

- Established new policies and procedures to support a doubled domestic staff and launch of 8 international locations.
- Kept startup and overhead expenses low by hiring independent contractors at each international location.
- Doubled domestic office and staff, performing all hiring activities, lease negotiations, etc.
- Slashed travel expenses up to \$300K annually by negotiating travel points with American Express corporate account.

**5X Growth
≤ 15% Overhead**

EARLY CAREER

Gained insights into effective management, cross-functional communications, and the relationship between IT and business while working in dynamic front-line roles at ACT Test, Victor Community Support Services, and Diamond of Florida. Built an early "can-do" outlook as IT manager at a VC startup, Delta Venture Partners, rolling up sleeves to set up IT infrastructure, manage health benefits, oversee payroll functions, and more.

EDUCATION AND PROFESSIONAL DEVELOPMENT

AA in Business, San Joaquin Delta College, Mountain House, CA; 1994

Completed accounting program at UC Davis Extension, Davis, CA; 2010

Completed additional professional development courses in business writing, management skills training, and project management training.

Member, Orlando Area Human Resource Association

FROM EXECUTIVE ASSISTANT TO CFO

Charles may have had only an associate's degree, but he had a knack for finance, operations, and IT that enabled him to work his way up from executive assistant to what amounted to a CFO role.

Having gone up through the ranks in his state tourism organization, he was primed to step into the CFO role at the national level when they needed help, but his only substantial experience was in his current role, which didn't even carry the official CFO title.

Luckily, his mentor and current boss was moving into the national CEO role, so he had a strong advocate. He came to me because he still had to pass the scrutiny of the board, who'd been jaded by past mismanagement.

I used a CFO award he'd won to position him as a CFO, despite the fact that he otherwise had not held the title. Through business cases, I highlighted his contributions—especially those as interim CFO for the very organization considering his candidacy. Graphs and callout boxes make it easy to understand his impact at a glance.

I sidestepped his initial title as executive assistant by simply stating he was hired to support the CEO—something that wouldn't take him out of the running, but that Charles felt comfortable expanding on in an interview if needed.

The result? He got the job!