

PROFILE

Heavily experienced operations and financial C-Level executive who drives business development, implements operational efficiencies, and closely manages financials. Specializes in transforming upside down entities into lean, healthy companies.

Extensive, multi-faceted background, providing advanced skills that continually assess and improve operations, formulate turnaround plans, and implement strategies to scale operations so companies can grow, increase profits, and return on investment.

Proven performance in saving organizations millions of dollars by restructuring sales plans and analyzing all costs, then renegotiating contracts, while upgrading technology, ultimately fueling staff energy and increasing the bottom line.

Experienced as in-house Counsel for smaller-sized businesses across multiple industries, providing corporate legal advice, minimizing risk, mediating potential issues, managing real estate, and completing due diligence on new sites and acquisitions.

Hands-On Operations Leadership
Drives Strong P & L Growth
Action-Oriented Strategic Plan
Diplomatic Turnaround Specialist
Creative Problem Solving Skills
Utilizes Real Estate & Facilities
Proficient Project Leader
Identifies New Sales Directions
Holds Team Accountable for KPI's
Flexible with Change Management
Technology Upgrade Leadership
Mediates Potential Legal Issues
Due Diligence & Acquisitions

LEADERSHIP HIGHLIGHTS

- ☑ **Revitalized stagnant \$5MM, 3-division, 4% profit company into \$13MM, 6-division, 10% profit company.**
- ☑ **Led maturing startup from \$100K / month loss to break even in 3 months, then \$1MM profit in 3 years.**
- ☑ **Coordinated launch of 15 new offices, utilizing custom model that attained profit in year 1.**
- ☑ **Reduced raw materials 10% through competitive bidding, soft volume commitments, and substitutions.**
- ☑ **Negotiated new contract generating 80% savings in annual IT expenses, completing full upgrade with savings.**
- ☑ **Drove significant growth in maturing a start-up from \$1MM to \$7MM over four years, reaching record profits.**
- ☑ **Increased total division sales over 100% through new sales structure, marketing campaigns, and cross-selling.**

EXPERIENCE

NEXT LEVEL MANAGEMENT, LLC Sylvania, OH

2001 to Present

Senior Business Executive filling roles as: Turnaround Specialist, Executive Coach, Real Estate Principal, Managing Partner, Financial Officer, Legal Counsel, and Marketing Strategist. Leads projects focused on generating more revenue, reducing operating expenses, increasing net profit, and accelerating business growth.

Turnarounds

- Managed 20 account investment portfolio thru pandemic, reaching over 100% net gain in 15 months.
- Slashed accounts receivable aging 87% after leading healthcare business EHR software overhaul.
- As CFO / GC, negotiated financing, sale, and reopening of closed Big 3 auto manufacturing plant.
- Completed due diligence and pro formas with CPA firm to eliminate \$2MM loss, then advised buyer during negotiations of an auto paint company through the bankruptcy bidding process.

Real Estate

- Strategically guided realty franchise turnaround, negotiated fee reductions, prepared for sale, and got it sold.
- Negotiated the purchase of luxury builder foreclosure 50% completed; became General Contractor, completed building with subcontractors, marketed, and sold property.
- Wholesale purchase of luxury home, rehabbed, marketed, showed, and sold for large ROI.
- Completed turnaround and rebranding of self-storage business; marketed, managed, filled it, and sold it.

Counsel

- Drafted software licenses, IP filings, sales contracts, and non-competes as Assistant GC for VC-funded developer.
- Joined estate planning law firm, conducted seminars, worked probate, and negotiated firm / partner earn-out.
- Led due diligence to form bankruptcy law firm, evaluated new office sites, tested software, and reviewed cases.
- Established cash flow acceleration business, drafted business plan, created marketing materials, and tested market.

Marketing-Business Development

- Established publishing company, hired contractors, published book series, distributed nationwide.
- Built e-commerce web site, wrote monthly e-zine, built follower list, added e-books, gained several reviews.
- Directed best-seller campaign for new book, formed online partnerships, promoted, and captured #1 ranking.
- Gained 100+ print and broadcast media spots, including several speaking engagements and key notes.

JCS, INC. Toledo, OH

Prior to 2002

Chief Operating Officer | Chief Executive Officer: Strategically directed extensive turnaround for this training, placement, and marketing company, transforming under-performing operations by changing marketing, sales, financial, IT, HR and legal, then accelerated organizational growth. Developed multiple new territories and partnerships, and diversified heavily to penetrate 4 new market segments, ultimately selling the company. Oversaw 250 employees.

- Skyrocketed sales growth 6-fold and boosted profit 10X in 4 years.
- Overhauled all financial systems, improving flexibility, timeliness, and reporting abilities.
- Launched 15 new sites through aggressive growth plans and custom-developed pro forma model.
- Delivered target of 20% EBIT through adopting lean and continuous improvement culture.
- Awarded 1st statewide contract over 50 competitors by forging key strategic alliances.

QRC, INC. Stryker, OH

Chief Financial Officer | Chief Operating Officer: Steered complex web of 5 businesses in unrelated industries, supervising GMs in each business, along with 60 staff and 300 production workers. Oversaw industrial packaging, wood manufacturing, custodial/lawn, micrographics/clerical, and catering/restaurant businesses in different towns.

- Grew organization from \$5MM to \$13MM and raised profit margins from 4% to 10%, creating 3 new divisions.
- Delivered 100% growth in new sales, instituting incentive-driven sales structure and broadening target market.
- Reduced risky large customer reliance by 15% in total manufacturing sales through new sales approaches.
- Achieved all-time record of 10% profit through lean operations techniques and a revolving budgeting system.
- Diversified customer base and sales mix to strengthen company's financial health and increase plant capacity.

EDUCATION

Juris Doctor | Master of Business Administration | Master of Healthcare Administration, *University of Toledo*

Bachelor of Science in Administration | Accounting | Management | Computer Science, *Defiance College*

Associate of Business in Finance | Computer Design, *Northwest State College*

BAR ADMISSIONS

State of Ohio | State of Michigan

CERTIFICATIONS

Certified Business Manager | Certified Management Accountant

LICENSURE

Investments -- Series 7, Series 66, Health/Life Licenses

PUBLICATIONS

1. Law Review article: *Canesi v Wilson: Satisfying Proximate Causation in a Wrongful Birth Claim*
(It was used as the next year's writing contest to qualify for law review)

2. #1 Best-Selling Book Series: *Life's Cheat Sheets* (www.lifescheatsheets.com); published and launched in 2010 by Prestige Media Group
 - A. Launch book: *Life's Cheat Sheets: Crucial Success Habits School Never Taught You*
(Included many parts of the next three books combined into my P.A.L. Blueprint to Success System)
[Launched my own publishing company to retain all of the intellectual property rights for back-end products]
 - B. 2nd Book in Series: *Life's Cheat Sheets: Crucial "Street-Smart" Habits School Never Taught You*
(Covers areas such as: Dream-big goal planning, Marketing/Sales savvy, Occupation search, Building relationships, Technology ...)
[Being Published Now]
 - C. 3rd Book in Series: *Life's Cheat Sheets: Crucial Mind Control Habits School Never Taught You*
(Covers areas such as: Mental Focus, Positive attitude, Visualizations, Affirmations, Growth material daily, Meditation/Yoga...)
[Being Published Now]
 - D. 4th Book in Series: *Life's Cheat Sheets: Crucial Future Planning Habits School Never Taught You*
(Covers areas such as: Financial planning 101, Passive income streams, Estate planning 101, Entrepreneurship...)
[Adding a couple new sections to current edited version; In publishing process now]
 - E. 5th Book in Series: *Life's Cheat Sheets: Crucial Financial Habits School Never Taught You*
(Covers areas such as: Employee income, Business income, Passive income, All major expenses, Expense saving techniques...)
[Fully drafted and 1st edit done; In publishing process now]
 - F. 6th Book in Series: *Life's Cheat Sheets: Crucial Negotiation Habits School Never Taught You*
(Covers areas such as: Strategic negotiating, 5-Step system, Leverage points, Research, BATNA, Historical actions, Practice...)
[Full Outline and some of draft is complete; Will start publishing process once fully drafted]
 - G. 7th Book in Series: *Life's Cheat Sheets: Crucial Leadership Habits School Never Taught You*
(Covers areas such as: Reputation, Perception, Instincts/Gut, Intuition, Follow up, Stick to your word, Think before you talk...)
[Full Outline and some of draft is complete; Will start publishing process once fully drafted]
 - H. 8th Book in Series: *Life's Cheat Sheets: Crucial Estate Planning Habits School Never Taught You*
(Covers areas such as: Several trusts, Advanced will sections, Specific devises, Estate planning 101 for everyone...)
[Outline is drafted; Won't enter publishing for some time]

3. Wrote and Published a Monthly E-zine that Ties to the Book Series Above for 4 years
(Includes Uplifting videos, Quotes, Highlight--Street-smart story, and Practical negotiation examples to apply)
[Historical issues can be found on www.LifesCheatSheets.com under the sign-up box on the right of the home page]

POTENTIAL TEACHING SUBJECTS

1. Business Planning (Business-Firm Start-up)
2. Corporations/Business Associations
3. Entrepreneurship
4. Banking/Financial Institutions
4. Financial Markets/Investing
5. Estate & Trusts (Probate)
6. Bankruptcy-Foreclosure & Business Turnaround
7. Real Estate
8. Dispute Resolution/Negotiation-Barter
9. Technology
10. Business Law
11. Employment/HR
12. Tax Planning/Reductions
13. Contracts/Drafting
14. Healthcare Law/Medical Malpractice