



# Peter Fazio

## Professional Background

SVP Finance and Controller in multiple companies with over 20 years of finance leadership, operating model, and business transformation experience. Finance consulting subject matter expert across the Order to Cash, Procure to Pay, and Record to Report process cycles.

## Contact

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## SKILLS

### Process Management

- Documentation
- Flow Modeling
- Gap Identification
- Improvement Design
- Transaction Processing Leader

### Transformation

- Project & Program Leadership
- Change Management
- System Implementation
- Process Automation

### Subject Matter Expert

- Order to Cash, OTC
- Procure to Pay, P2P
- Record to Report, RTR
- Finance Operating Model
- Training Delivery

## Education

**LONG ISLAND UNIVERSITY, CW POST**  
MASTERS of SCIENCE, ACCOUNTING

**STATE UNIVERSITY OF NEW YORK, NEW PALTZ, NY**  
BACHELOR OF ARTS, POLITICAL SCIENCE

## Detailed Work Experience

### Principal, Finance Transformation Consulting

#### Peter Fazio Consulting

New York, NY

2022 - Present

Independent contractor providing finance transformation, program management and interim finance leadership services to companies

### Adjunct Professor

#### Long Island University, CW Post

Brookville, NY

2022 - Present

Part-time role as an instructor for accounting and business courses in the university's College of Management

### Director, Finance Transformation Consulting

#### Accordian Partners

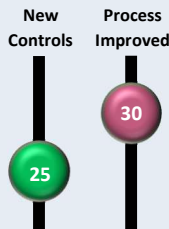
New York, NY

2021 - 2022

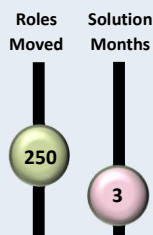
Lead finance transformation projects focused on the office of the CFO for client's who are primarily affiliated with companies within private capital markets. Professional services provided include process assessment and improvement identification and implementation, operating model design, external audit preparation, compliance reviews, policy development, internal controls, business process outsourcing and due diligence for mergers and acquisitions. Procure-to-Pay (P2P) subject matter expert for development of Accordian go-to-market strategy, tools and enablers, and definition of leading practices. Developed finance transformation training curriculum for new consultants.

## Finance Transformation Highlights

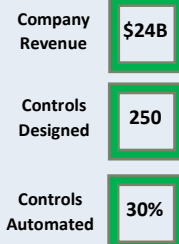
Finance assessment of acquisition in South Korea for leading automotive company



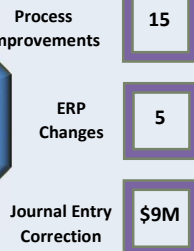
Lead team of 40+ to document processes, lift & shift roles to off-shore Shared Services Center



Design Order to Cash internal controls for SAP implementation for global technology company



Find & correct root causes of goods receipt process breakdown for life sciences company



Transformation of Order to Cash process to significantly increase performance metrics for global chemical company



## Detailed Work Experience Continued

### Senior Vice President Finance

#### USO of Metropolitan New York

New York, NY

2020 - 2021

Lead the finance and human resources functions at the premier nonprofit enterprise delivering services to military members and their families.

- Lead development of the annual budget and monthly cash forecast Create financial analysis of operations to identify service areas requiring performance improvement
- Develop and present finance and operational performance analysis to board of directors quarterly
- Manage the financial planning, accounting, and reporting for facility building projects
- Supervised the customer service activities in online commerce

### Senior Manager, Finance Transformation Consulting

#### Ernst & Young

New York, NY

2010 - 2020

Assist large global companies across several industries with transformation of their finance function into a world class service provider from the transaction to the strategic level. Provide project management and subject matter expert services to clients across multiple industries.

### Principal, Finance Transformation Consulting

#### Peter Fazio & Associates

New York, NY

2009 - 2010

Independent contractor providing finance transformation, program management and interim finance leadership services to companies

### Manager, Finance Transformation Consulting

#### BearingPoint Inc.

New York, NY

2007 - 2009

Managed consulting engagement teams delivering professional services to major corporations in North America focused on revenue recognition, finance software selection, internal controls, management reporting

### Manager, Global SOX Compliance

#### Computer Associates

Islandia, NY

2005 - 2007

Leader of the global Sarbanes-Oxley compliance team for the Technology Services business unit

### Business Unit Controller

#### Deutsche Telekom (T-Systems North America)

New York, NY

2004 - 2005

Controller for T-Systems business unit in the United States. Led all finance and accounting functions.

### Business Unit Controller

#### Nokia (Vertu Business Unit)

New York, NY

2001 - 2004

Leader of all finance functions for Nokia's luxury mobile phone business in North America

## Past Clients

<b>ONYX</b> Finance Assessment	<b>XEROX</b> Shared Services Implementation	<b>tyco</b> OTC Outsourcing
<b>Honeywell</b> Operating Model Design	<b>CAT</b> Acquisition Integration	<b>KOMATSU</b> Lease Accounting
<b>ESTÉE LAUDER</b> Chart of Accounts	<b>zoetis</b> P2P Process Transformation	<b>BT</b> Joint Venture Implementation
<b>General Electric</b> SSC Process Design	<b>Pfizer</b> Finance Process Design	<b>DELL Technologies</b> SAP Implementation

## Published Author

- ❖ “Leading Practice Guide: Source to Pay Process Cycle”, Accordion Partners, 2022
- ❖ “Essential Consulting Skills: Basic Training for the New Consultant”, LinkedIn, 2021
- ❖ “Chart of Accounts Design Methodology”, Ernst & Young, 2015
- ❖ “Accounting Revenue Governance: Integrated Assurance to Strengthen an Ethical Culture”, Financial Executive Magazine, Financial Executives International, December 2013
- ❖ “Conflict of interest: It’s not so bad if I don’t get any benefit out of it. Right?”, Compliance and Ethics Professional, Society of Corporate Compliance and Ethics, May/June 2013
- ❖ “The Ethical Threshold in the SOX Era”, Compliance and Ethics Professional, Society of Corporate Compliance and Ethics, February 2010

## Detailed Work Experience Continued

### Senior Consultant and Auditor

#### PricewaterhouseCoopers LLP

New York, NY

1995 - 2001

Audited financial statements 1995 – 1997. Managed consulting engagement teams delivering finance transformation services to major corporations in North America and Europe, 1997 – 2001.

## International Experience

### Asia

- Managed process documentation and knowledge transfer activities to move mid-level roles to shared services center in Philippines
- Lead team in South Korea to identify process and controls improvement opportunities for US global automotive company
- Conducted process review workshops in China to identify areas for improvement in Order-to-Cash activities of chemicals company

### Europe

- Led three teams in the United Kingdom to facilitate transfer of finance roles to a shared services center in Asia
- Led process design workshops in Belgium for a global manufacturer
- Led organizational design meetings in the United Kingdom for finance transformation initiative of business services company

### South America

- Conducted process design meetings with affiliates in Brazil, and Chile for Japan automotive company

## Awards and Achievements

- Ernst & Young Leading Training Facilitator in USA
- Commissioned Officer in the United States Army, Captain, Infantry

## Certifications & Certificates

