

# KIRK PISCHEL, CPA, CMA, CFM

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## Finance & Accounting Professional

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### SKILL SUMMARY

- Finance, planning & analysis
- Accounting policy/controls
- Payroll/AP/AR/GL/fixed assets
- Hands on “clean-up” & review
- Strategic/long-range planning
- Multi-company/multi-site ops
- Contract analysis and negotiation
- Risk management
- GAAP, regulatory & tax rptg
- Audit & due diligence
- Audit preparation & support
- Economic damages valuation

### EXPERIENCE & EDUCATIONAL SUMMARY

- 20+ years in finance & accounting
  - 15+ years in management
  - MBA in Finance
  - CPA, CMA (equiv. of internal CPA), CFM
  - Start-up operational expert
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### PROFESSIONAL EXPERIENCE

#### *Representative Engagements, San Francisco, California*

**Summer 2001 through present**

- **TastemakerX Inc. – Controller/Consultant** - FP&A; financial reporting and modeling; accounting policy, controls & infrastructure; hands on “clean-up” & review; AP/AR/GL.
- **SonicLiving, Inc. – Controller/Consultant** - FP&A; financial reporting and modeling; accounting policy, controls & infrastructure; hands on “clean-up” & review; AP/AR/GL.
- **Dogster, Inc. – Controller/Consultant** - FP&A; financial reporting and modeling; accounting policy, controls & infrastructure; hands on “clean-up” & review; AP/AR/GL.
- **WestComp Holdings – Controller/Consultant** - Accounting policy, controls & infrastructure; hands on “clean-up” & review; Payroll/AP/AR/GL; contract negotiation; audit preparation; special projects.
- **Litigation Economics – Consultant** – Over 80 cases spanning Personal Injury, Business Law and Employment. Economic damages assessment through complex case analysis utilizing discounted cash flow modeling and economic research. Testimony in the California Superior Court system.
- **Tribe Networks – Controller/Consultant** - FP&A; financial reporting and modeling; accounting policy, controls & infrastructure; hands on “clean-up” & review; Payroll/AP/AR/GL; financing diligence and audit.

#### *eCoverage, San Francisco, California*

**1999 through Spring 2001**

#### **DIRECTOR OF FINANCE & CONTROLLER**

- **Overall financial responsibility for \$30MM, 75-employee, 2-site, financial services technology start-up.** Responsible for financial analysis, reporting, accounting and controls; revenue and expense recognition; liquidity management; payroll; AP; risk management; CPA, vendor and banking relationships.
- **Financial reporting.** Responsible for GAAP, regulatory and tax reporting on both a consolidated and stand-alone basis.
- **Supervised five. Reported to CEO and VP Risk Management.** Managed staff, including AP, staff accountants, accounting specialist. Consulted with members of senior management team, including CEO, general counsel, technology, marketing and product development.

### Major Projects/Achievements

- **Developed core financial infrastructure:**
  - **Successful completion of two “clean” audits (one a “Big 5”).**
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 PROFESSIONAL EXPERIENCE (Continued)

**Fireman's Fund Insurance, Novato, California**  
**FINANCE DIRECTOR (1994 to 1999)**
**1982 to 1999**

- **Overall financial responsibility for \$100MM, 250-employee, 25-branch business unit.**  
Responsible for financial analysis and reporting (P-to-P, outlooks, etc.), business unit accounting, financial controls, reserve and accrual analyses and funding, corporate expense allocation review, balance sheet, and A/R policy and procedure. Identification and correction of misallocated/misprocessed expense.
- **Develop strategic and business plans for business unit.**  
Strategic and business planning for \$100 million sales, \$23 million internal expense, \$13 million external expense and \$30 million claim expense budgets. Conduct annual economic, benchmark and peer studies.
- **Supervised up to nine analysts. Reported to Finance & Admin. Officer and SVP Corporate Finance.**  
Coordinate with business unit SVPs and VPs, MIS, Legal, Division and Corporate Controllers, VP Actuarial, Tax, VP Finance, field managers and external auditors. Reinsurance team lead rotation.

**ASSOCIATE FINANCE DIRECTOR/FINANCE PROJECT MANAGER (1991 to 1994)**

- Created strategy for reducing production-related licensing costs, saving \$150,000 annually. Developed and implemented new dividend-reserving methodology, saving \$900,000. Reduced bad debt reserve by \$950,000 through application of credit scoring.
- Member of president's elite task force chartered for division turn around. Co-authored white paper to planning group. Recommendations implemented.
- Developed/implemented claim-reserving methodology, deferring for five years a \$7 million charge. Improved average collection period by five days on average receivables balances of \$8.75 million.

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**EDUCATION**

MBA-Finance, Golden Gate University, San Francisco, California  
 BA-Economics/Political Science, University of California, Berkeley, California

**CERTIFICATIONS**

CPA – California License  
 CMA - Certified Management Accountant  
 CFM - Certified in Financial Management  
 CPCU - Chartered Property Casualty Underwriter

**TRAINING**

Continuing education through UC Berkeley Extension in Finance and Accounting; ongoing.

**TEACHING**

Accounting courses (academic credit), UC Berkeley Extension, ongoing.

**TECHNICAL**

Spreadsheet, database, presentation and word processing (Lotus and Microsoft tools); QuickBooks Pro; ADP for Windows; BESTs FAS fixed asset tracking; Equity Edge (stock option tracking); ad hoc Business Objects and SAS reporting as needed.

**AFFILIATIONS**

Institute of Management Accountants

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