

Expertise

Independent consultant specializing in forensic analysis of financial accounts in support of securities-related complaints. Perform damage calculations to show the profit and loss of the portfolio and individual investments. Show asset allocation, trade frequency and costs, deposits and withdrawals, market-adjusted analysis, and other detailed case specific analyses. Experienced with numerous investment vehicles, including but not limited to stocks, bonds, mutual funds, options, futures, and private placements.

Finance Professional Experience

Restoration Forensic Consulting, Sandpoint, Idaho 2024-Present
Founder, Forensic Consultant

- Provide forensic analysis of financial accounts in support of securities complaints.
- Conduct forensic analysis of financial statements assessing profit and loss, flow of funds, transaction frequency and costs, market adjusted analysis, and suitability assessments.

Restoration Trading, Sandpoint, Idaho 2024-Present
Founder, Financial Consultant, Fractional CFO, Financial Educator

- Collaborate with organization executives and board members preparing strategic financial plans and projections.
- Create financial budgets, proforma projections of revenues and expenses, CAPEX analysis, and other financial analyses.
- Create and present financial reports for executives, board members, and investors.

Cornerstone Financial Services, Dallas, Texas 2009 - 2016
Office of Supervisory Jurisdiction (OSJ), Financial Analyst
Affiliated with Independent Financial Group (IFG)

- Conducted daily compliance supervision for the firm.
- Held Series 7, Series 66, and Series 24 securities licenses.
- Created numerous processes and tools improving operational efficiency and company performance.
- Developed tools to track the daily performance of investment strategies.
- Developed processes working with a precious metals wholesaler and managed all physical precious metals sales for clients.
- Member of investment team performing internal due diligence on investment strategies, including stocks, bonds, mutual funds, private placements, ETFs, and other securities.
- Conducted economic and investment research.
- Monitored client suitability for investment recommendations.
- Collaborated with the compliance team at IFG, approving marketing materials, newsletters, and radio recordings.

Genesis Forensic Consulting, Mansfield, Texas

2013 – 2015

Forensic Consultant

- Conducted forensic analysis of securities and flow of funds for several securities-related claims.
- Completed damage assessments, comparative analysis, and other key analyses of client statements.

Engineering Professional Experience**The Boeing Company, San Antonio, Texas**

2019 - 2024

Senior Lead Design Engineer

- Led a multi-location design team in developing wiring integration with the airplane structure. Responsible for scheduling, forecasting manpower needs, tracking budget and performance, and prioritizing team activities. Provided design and producibility guidance.

Bombardier US Aerostructures, Red Oak, Texas (through program buyout)

2016 - 2019

Triumph Aerostructures, Red Oak, Texas

Senior Lead Design Engineer / Operations Support IPT Leader

- Led a design engineering team supporting change activity for a wing development program. The primary role involved coordinating changes and deliverables among multi-location assembly facilities, the supply chain, and engineering teams.
- Led a multi-functional team supporting the manufacturing process for a portion of the wing. Responsible for scheduling, forecasting manpower needs, tracking budget and performance, and prioritizing the team's activities. Oversaw and helped implement numerous trade studies and process changes to improve efficiency and accelerate the rate of production.

Vought Aircraft Industries, Arlington, Texas

2004 - 2009

Lead Design Engineer

The Boeing Company, San Antonio, Texas

1987 - 2002

Lead Design Engineer

Education

BS, Mechanical Engineering, North Dakota State University, Fargo, ND

Tau Beta Pi (Engineering Honor Society)

Pi Tau Sigma (Mechanical Engineering Honor Society)

MBA, City University of Seattle, Seattle, WA (Presidential Honors)

CFP Professional Education Program, College for Financial Planning, Centennial, CO

Professional Licenses, Designations, and Memberships

Licensed Professional Engineer (PE), Mechanical Engineering, WA State

Certified Financial Planner (CFP)

Toastmasters International, completed the Communication and Leadership Program

Associate Member, Securities Experts Roundtable

Series 7, Series 66, and Series 24 Licenses (Expired)

Volunteer Activities**Cornerstone-DPC, Sandpoint, Idaho**

2023-Current

Board Treasurer and Financial Consultant

- Created and maintained a monthly budget analysis to actual spending.
- Create budget projections based on business goals.
- Audit accounting and financial records of the non-profit.
- Report to the Board of Directors monthly
- Manage subscriptions and invoices for numerous service providers.

Harvest Valley Worship Center, Sandpoint, Idaho

2024-Current

Financial Education and Consultant

- Finance committee member and advising on budget projections and financial goals.
- Conduct financial education classes for members and youth groups.
- Perform financial counseling for members.

Justice Society, Sandpoint, Idaho

2012-Current

Board President and Treasurer

- Manage all administrative and regulatory requirements for the non-profit organization.
- Perform accounting and budget activities using QuickBooks.
- Collaborate with the Executive Director for strategic planning and financial projections.