# Name, FCPA, FCA

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## TRANSFORMATION LEADER

### A financial services corporate executive and board member with over 25 years of experience leading, changing and building profitable and effective business environments and cultures. Ten years focused on designing organization-wide operational & structural change; over ten years consulting with clients to improve organizational effectiveness. Strong leadership, decision-making and communication skills. Highly skilled in supporting executives to achieve results, building high-performing teams, and in diagnosing and solving complex problems. Mentor and role model throughout career with extensive insight into planning and achieving professional goals across various industries, with a particular focus on supporting working women.

## Board experience

* **Advisor to Chair of the Board**, Women’s Centre of York Region 20XX – 20XX
	+ Retained on a pro-bono basis to assess the organization’s operations and provide recommendations on improving overall efficiency and effectiveness.
	+ Identified significant opportunities for short-term and strategic change to advance the organization’s mandate
* **Treasurer and Member of the Board**, Until the Last Child 20XX – 20XX
	+ Led development of financial reporting for organization’s first year as a charitable organization under Canada Revenue Agency guidelines
	+ Identified sound governance practices which helped to obtain significant funding and to advance the mandate of the organization by partnering with children’s aid organizations
* **President, Kidney Foundation of Canada** (“KFOC”), Greater Ontario Branch 20XX – 20XX
* **Board Member,** KFOC, (Greater) Ontario Branch 20XX – 20XX
	+ Contributed to raising and managing gross revenues of approximately $4MM per year for the advancement of kidney disease research, organ donation awareness, and provision of patient services
	+ Served as Treasurer from 1998 to 2000; created financial performance and benchmarks for tracking results and improving Board accountability
	+ Key leader in the amalgamation of three separate Ontario Branches into one branch, to enhance effectiveness of governance at the National Board level
	+ Winner of the George de Veber Distinguished Service Award, given in recognition of a lifelong commitment to furthering the goals and objectives of the Kidney Foundation, Greater Ontario Branch
* **Board Member, Kidney Foundation of Canada** 20XX – 20XX
	+ Member of the National Board’s Finance and Audit Committee, 1998 to 2006, overseeing budgets and presentations to the Board on the organization’s net revenue ($12MM to $14MM annually), expense and program management, and funding of medical research grants
	+ Vice President of the Board, 20XX – 20XX
	+ Winner of the David Ornstein Award for Distinguished Service, 2005. This award is given to an individual volunteer meriting special recognition for their work toward the significant growth, development or increased public recognition of The Kidney Foundation of Canada in a specific region.

## PrOFESSIONAL EXPERIENCE

### COMAPANY NAME, toronto, on 20XX – 20XX

#### Senior Vice President, Structural Cost Transformation (20XX – 20XX)

* Senior member of select executive project team established by the CEO to drive structural cost reduction, under the leadership of McKinsey Canada’s Managing Partner. Worked closely with senior executives in Canada and Asia and contributed to a significant restructuring charge approved by the Board and taken by the Bank in 2016.

#### Senior Vice President, Governance & Design,

####  International Banking (IB) Operations & Shared Services (20XX – 20XX)

* Led team of 100+ employees and $20MM operating budget which executed strategic and operational effectiveness initiatives across International Banking operations. Scope included Retail, Commercial Banking, and back office operations for Caribbean, Central & Latin America.
* Defined strategy and operating models for major customer processes, to improve customer experience & operational efficiencies. Improved cycle time by 15% to 60%.
* Exceeded multi-million dollar Strategic Sourcing target for IB’s major markets.

#### Vice President, Operating Model Design,

####  International Banking Operations & Shared Services (20XX – 20XX)

* Built and led high-performing team (that developed reputation as one of best teams to work for in the Bank) which designed and implemented major operational and organizational changes in the Caribbean, Central America, Mexico, Peru and Chile. Based on results delivered, built case to grow team from 20 staff in 2007 to over 60, and expand mandate to include strategic initiatives.
* Led a major “end to end” review and process/ organizational change of Commercial Lending, affecting over 1000 employees. Worked extensively with senior executives in head office and the countries, and achieved 50% improvement in customer loan cycle time, across IB’s ten key markets. These changes also resulted in material, above-plan revenue increases.
* Led development and execution of strategic methodology to assess country performance for IB’s three largest markets, with significant savings identified.
* Chosen by Bank senior management and seconded to lead a cross-functional project team to address lengthy loan turnaround times in Canadian Private Banking. Designed process, structural, new job positions, technology and policy improvements that reduced turnaround time by 40%.
* Leveraged StrengthsFinder and improved Employee Engagement scores by 10%, surpassing Scotiabank and industry results.

### NAME OF COMPANY, internal control, cfo function, toronto, on 20XX – 20XX

#### Vice President, Internal Control

* Led a team of 35 accounting and banking professionals which oversaw the re-design and execution of company’s operational, financial (“Sarbanes-Oxley”) and general entity controls program. Remediated significant deficiencies that were reported to the Audit Committee.

### NAME OF COMPANY canada, toronto, on 20XX – 20XX

#### VP and Leader, Finance & Employee Transformation (20XX – 20XX)

#### VP/Partner, Financial Services and Customer Relationship Management (1999 – 2001)

#### Consultant/Senior Consultant/Senior Manager, Process Improvement (1991 – 1999)

#### Leadership and Management

* Led CGEY Canada’s Finance & Employee Transformation Practice, a diverse team of 30 Finance and Human Resource consultants in selling and delivering major change initiatives:
	+ Met aggressive revenue/profitability targets and improved productivity by 40%;
	+ Launched new Finance and HR solutions to clients and other internal sales teams;
	+ Developed team – recruitment, retention, performance management, career coaching.
* Four-time recipient of EY’s “Star Performance Award” for outstanding client results and teamwork, as selected by a peer panel.
* Developed EY’s first external contact centre survey with Angus Reid; authored article on the findings and was interviewed by the press.
* Founding member of Cap Gemini’s Canadian Women’s Network.

#### Organizational Design

* Redesigned the technology and operations finance group in partnership with the CFO of a major bank. Researched leading practices and facilitated sessions. Built a new organization chart to support the ever-growing demands of this large business unit.
* Directed an organizational assessment of the finance department for the CFO of the Canadian division of a major international restaurant chain. Developed new organization structure, performance metrics, career progression model, and required core competencies.

#### Strategy and Transformation

* Managed a large-scale program (50+ consultants and bank resources) in the direct banking division of a major Canadian bank. Implemented major changes to customer and human resource management processes. Achieved 20% savings (built into Bank’s operating plans).
* Directed design and implementation of new business model to achieve “world-class” customer service in a credit card company. Achieved 25% productivity gain and improvements to customer service, winning a Canadian Institute for Productivity Award (CIPA).

## EDUCATION & PROFESSIONAL DEVELOPMENT

* Named a Fellow of the Institute of Chartered Accountants of Ontario, 20XX
* Ernst & Young courses in strategy, change management, sales leadership, team leadership, and project management.
* Chartered Accountant, 20XX
* Certified Management Consultant 20XX
* B.A., Honours Business Administration, Western University (Ivey School of Business)

## interests & community involvement

* Speaker, table host at Women’s Network events at EY and Scotiabank 20XX
* Co-Chair, United Way, IB-Scotiabank (highest participation rate & 107% of $ target) 20XX
* Fundraising Co-Chair, Ivey Business School HBA Class Reunion 20XX
* Presenter at CGA Ontario Annual Conference 20XX
* Active fundraiser for Weekend to End Women’s Cancers, OneWalk, Terry Fox Run 20XX
* French – Intermediate, Spanish – Beginner