

JODY MATTHEW HEYROTH, CPA

5460 S. Quail Way | Littleton, CO 80127 | 303-904-9710 | heyroth@usa.com

Financial professional and entrepreneurial problem solver, with experience in public accounting, assurance services, and small business. Rare combination of ability to analyze detailed accounting transactions and processes, together with “big-picture” decision making, based on long-term financial and operational planning. Drawn to opportunities for providing guidance, encouragement, and support in achieving goals and success, particularly to small businesses.

Specific expertise in:

- Budgeting
- Activity Forecasting
- Financial and Operational Analysis
- Financial Reporting
- Program Management
- Leadership
- Complex Problem Solving
- Coaching, Facilitating, and Consulting

EDUCATION AND CREDENTIALS

MBA – Corporate Finance, Daniels College of Business, University of Denver (currently in progress)

BSBA – Finance and Accounting, Colorado State University (1998)

Certified Public Accountant, State of Colorado (2000)

FINANCIAL EXPERIENCE

Great West Life Annuity & Insurance Company – Denver, CO (2001 – present)

Assistant Manager, Internal Audit

Examine, improve, and optimize financial and operational issues and variables, in response to initiatives as defined by the CFO, board of directors, or executive team.

- Consult to managers and directors, to recommend appropriate measures, minimizing financial risk and maximizing operational efficiency
- Investigate details and global process to determine where financial errors and operational inefficiencies reside, to affect accurate financial reporting, profitability and business success
- Create detailed visual and narrative flow-charting of client processes (using Visio), including monthly financial reporting, to document and identify best practices
- Assess financial and operational controls for core business products in cooperation with external auditors, to comply with Federal reporting requirements
- Supervise and mentor members of internal audit department, ensuring accuracy in testing procedures and effective client communication
- Successfully assemble cross-functional teams of client groups (up to 8 members), establish objectives, initiate problem solving process, and determine and assign action items on a go-forward basis
- Coach clients on error prevention and detection, and initiate and facilitate discussions between various parties within the company, relating effectively to people at various ranks and levels

Grant Thornton LLP – Denver, CO (1999 – 2001)

Auditor

Developed and maintained relationships with private, non-profit, and governmental organizations. Analyzed financial transactions, balance sheet and income statement items, and financial and budget variances (including ratio and trend analysis). Prepared and presented financial statements, including footnote disclosures.

- Consulted with client to recommend steps to increase efficiency and achieve long-term goals
- Assimilated fragmented pieces of information, to conclude relevant business decisions and made specific, impromptu decisions regarding engagement
- Analyzed internal controls, and recommended improvements to reduce unnecessary business risk
- Planned and managed all aspects of client engagement, including needs assessment, project budgeting, scheduling and staffing requirements
- Managed client conflicts and eased tension surrounding audit, to facilitate fluid engagements
- Supervised audit staff, assigning and evaluating work, for adherence to professional guidelines

Financial Experience, continued

ABC Pediatric Medical Clinic, PC – Glenwood Springs, CO (1995 – 1998)

Family-owned pediatric practice of 9 full-time employees, primarily serving indigent Spanish population in a small Colorado mountain town

Business Consultant

Advised business owners on financing alternatives, marketing strategies, and management techniques, including corporate restructuring, utilization of employees to maximize efficiency and effectiveness, and final exit strategy.

- Transitioned to this position after one year as Office Manager
- Forecasting and planning through cash flow analysis
- Financial planning through historical and trend analysis

Office Manager

Hired, trained, and supervised front office staff. Planned and forecasted daily/monthly/quarterly revenue and cash flows. Quarterly and annual financial reporting. Bookkeeping, including maintenance of check register and accounts receivable/payable.

- Quickly promoted to this position, from Accounts Receivable Clerk, after one year
- Major role in establishing a joint satellite office, including market analysis, forecasting, and public polling
- Mediation and conflict resolution between personnel, clients, and insurance companies

OTHER BUSINESS EXPERIENCE

Web Site Developer, Freelance – Fort Collins, CO (1998)

Assistant IT Training Coordinator, Animal and Plant Health Inspection Service, USDA – Fort Collins, CO (1998)

COMMUNITY INVOLVEMENT

Economics Consultant, Junior Achievement, Dakota Ridge Middle School – Littleton, CO (2001 – 2002)

Accounting Lecturer/Mentor, State of Colorado High School Accounting Education Initiative (2001 – 2002)

PROFESSIONAL ASSOCIATIONS

American Institute of CPAs (2000 – present)

Colorado Society of CPAs (2001 – present)

Institute of Internal Auditors (2001 – present)

SUMMARY OF FUNCTIONAL SKILLS

Finance Skills

- Analysis of risk and return, dividend policy, capital budgeting and capital structuring
- Financial planning of cash flows through historical and trend analysis
- Long-term and short-term forecasting of revenue and income
- Market/Security tracking and analysis for trends
- Using financial derivatives including futures, forwards and swaps for hedging and arbitrage
- Foreign exchange, exposure, hedging, trading and international markets

Accounting Skills

- Production of Financial statements including: Balance Sheet, Income Statement, Statement of Retained Earnings, Statement of Cash Flows
- Knowledge of Generally Accepted Accounting Principles (GAAP) and accounting trends
- Maintenance and reconciliation of General Ledger, including accrual and deferred management
- Using accounting data for planning and controlling business operations
- Accounting for process costs, joint products and by-products
- Cost accounting analysis for budgeting and efficiency purposes
- Accounting for partnerships and branches/subsidiaries of parent corporations