

# Board of Director 2024 Election Results

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**ALPHA KAPPA PSI**  
*The Professional Business Fraternity*

February 20, 2024

The Alpha Kappa Psi Fraternity would like to announce the re-election of Jane Azzinaro, Lane Velayo and David Wendroff.

Azzinaro, Velayo and Wendroff will serve 3-year terms, which will begin on July 27, 2024, and will be re-installed as directors during the Fraternity Board meeting.

The Alpha Kappa Psi Board of Directors are elected by representatives of all currently recognized chapters in the fraternity. The responsibilities of the board include making all policy and strategy decision for the organization in between sessions of the chapter congress (every two years) and providing oversight to all organizational operations.

For the position of Director: Jane Azzinaro  
Manager, Digital & Analytics  
Senior Associate, Digital Transformation, Kearney

For the position of Director: Lane Velayo  
CEO/Owner, Synergos Association Management

For the position of Director: David Wendroff  
Owner, David P Wendroff, CPA

All directors-elect résumés are attached to this statement.

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# JANE AZZINARO, CFV

Omega Theta '10-Life | Silver & Bronze Distinguished Service Awards | AKPsiJane@gmail.com

## SUMMARY

A Silver DSA recipient for dedication of service for 10+ years, Jane currently serves the Fraternity Board of Directors as Vice Chair, leveraging her experience in strategic and executive advisory to define and guide the organization's long-term vision.

As former Fraternity Vice President and Regional Director, she has experience implementing the Board of Directors' vision and communicating our Fraternity's long-term goals throughout the organization. Her Area team drove fraternity wide projects, through development of a standardized budget template for the Management Team and support of Task Forces -- brainstorming and developing solutions to questions we face as a Fraternity.

Jane faces challenges head on with determination, willing and able to make strategic decisions to define and achieve Fraternity goals. As a Regional Director, she communicated a clear statement of growth expectations and goals and provided the support and resources for the team to support their chapters in achieving those goals. Over the course of the year, she delivered resources to volunteers and grew the Regional Management Team with first-time alumni volunteers. Though her team's leadership, students executed strong, smart recruitments driving 91% attainment of the Board of Directors' year-end chapter size goal for 2017-18.

Recognized by Silver and Bronze DSAs, Regional Manager of the Year, and chapter specific awards, Jane has continued to lead by example and encourage students, volunteers, and alumni alike to consider all paths and understand their personal roadmaps to achieve long-term goals.

## FRATERNITY VOLUNTEER EXPERIENCE

### **Fraternity Board of Directors**

2021 - Present

Provides strategic direction and governance for the organization, subsequently executed by Staff, elected officers and volunteers across the globe to support 250,000+ members

#### *Vice Chair*

2023 - Present

- Co-lead and execute Alpha Kappa Psi's Strategic Roadmap and supporting initiatives in concert with Chair
- Lead and facilitate strategic development sessions with the Board of Directors and Alpha Kappa Psi Staff
- Delegate and assign strategic initiatives to fellow board members
- Design strategic initiatives end-to-end – develop charters, draft plans, define deliverables, and recommend staffing
- Provide oversight and resolve conflicts and issues associated with implementation of strategic initiatives

#### *Secretary*

2022-2023

- Documented all formal minutes of Board meetings, ensuring timely distribution in line with policy
- Guided Board of Directors meetings to ensure agenda adherence and procedural compliance
- Led strategic risk assessment to guide strategic direction and risk mitigation strategies – adopted for annual refresh starting 2024 to inform prioritization of future initiatives

#### *Director*

2021-Present

- Participate and lead strategic initiatives deployment and delivery
- Provide critical insights from professional background adding to the diversity of the board of directors
- Communicate and provide feedback on strategic initiatives and policies

### **Board Committees:**

- Executive – provide performance review and corporate governance oversight; identify how best to drive the Board forward to achieve the Strategic Roadmap
- Governance – provide guidance and direction on interpretation of governing and operational documentation; coordinate shift to realign and update documentation

### **Management Team**

#### ***Vice President, Area III and Chapter Development & Operations***

Sept. 2018-Oct. 2019

- Executive volunteer officer accountable for strategic direction and supervision of four Regions of 50+ Chapters
- Understood, translated, and provided guidance on implementation of Board of Directors' strategic vision
- Managed and mentored four Board of Directors-appointed Regional Directors across Mid-Atlantic region, driving their leadership development and goal achievement leading to recognition as the only Area to meet all goals for 2019-20
- Advised Fraternity Staff on chapter operational improvements and Fraternity-wide leadership pathway implementation
- Served on Integration Management Council to operationalize Board and Senior Management vision and goals for global Salesforce platform adoption by volunteers and students
- Advocated for project management approach, Fraternity Staff and Volunteer partnership, and Fraternity communications plan to successfully operationalize, support, and socialize initiatives
- Supported re-installation of Garden State Alumni chapter in 2019

**Regional Director, Central Atlantic Region**

May 2016-Sept. 2018

- Oversaw 17 chapters with over 1,200+ student members, serving as their advocate when necessary
- Planned and managed Regional budget of approximately \$4,000 per year to drive Regional goals, incentives, and volunteer appreciation
- Ensured compliance with Fraternity policy and conduct guidelines in coordination with the Judiciary Committee and subsequent shifts in Probation and Show Cause expectations
- Appointed, led, and empowered a Regional Management Team of over 30 volunteers, training them to support our students while growing as individuals and professionals
- Coordinated and organized Regional Assemblies, specialized, and individual trainings to provide chapters with the proper training and resources required
- Engaged cross-functional teams of volunteers and Fraternity Staff to better support chapters, ensuring a wide net of support be available to students
- Managed conflicts at all levels of Region, serving as a mediator to refocus efforts in a constructive
- Member of Fraternity Management Team, providing input for strategic operations for the organization at-large
- Installed Chi Iota Chapter at Loyola University Maryland in 2016

**Fraternity-Level****All-AKPsi Academic Team, Application Evaluator**

2020, 2021

- Evaluated 50+ All-AKPsi Academic Team applications for Foundation to determine educational grant recipients

**Pledge Education Task Force**

2016-2017

- Collaboratively revamped fraternity Pledge Education Program (PEP) resulting in development of the LEAD Pilot Program with 40+ chapter participants to inform next iteration of educational programming
- Co-created a comprehensive educational program to meet Fraternity expectations and needs while prioritizing risk reduction, consistency, and professionalism for all chapters and University officials can understand and recognize
- Resulted in creation and Fraternity-wide rollout of the Bridge To Brotherhood program in 2019, with praise for global focus with chapter-level flexibility
- Task Force members worked as change agents and educators on new process and expectations, leading shift in perception of rewards & recognition around current and future potential new member programming

**Chapter Operations Task Force**

2017

- Assessed new evaluation structure for student and alumni chapters to encourage positive behaviors and align rewards
- Collaborated to design tiered awards structure, allowing chapters to attain recognition in various areas of operations and provide a clear path for improvement toward operational excellence

**Volunteer Certification Committee**

2014-2015

- Determined baseline information all future Fraternity volunteers should be expected to know, providing long-term consistency in volunteer proficiency and understanding of important policies and procedures
- Provided input on the creation of the Qualified Fraternity Volunteer (QFV) Exam, now required of all volunteers
- Informed the redesign of the Certified Fraternity Volunteer (CFV) exam to demonstrate advanced Fraternal knowledge, driving volunteers' ability to provide quick and accurate information to students

**Board of Directors' Nominations Committee***Mideast Region (2012), Eastern Region (2014), Central Atlantic Region (2015)*

- Selected to represent the Region in evaluating the candidates for the Fraternity Board of Directors
- Evaluate candidates and hold Region's vote to determine slate of candidates

*Board of Directors Representative (2022, 2023)*

- Selected by Chair of the Board of Directors to represent Board interests in evaluation of candidates for the Fraternity Board of Directors
- Evaluate candidates and hold the Board's vote to determine slate of candidates

**Central Atlantic Region****Regional Chief Operating Officer***Regional Director: Robert Francis*

Dec. 2019-Jul. 2020

- Developed, organized, realigned and managed Regional initiatives to achieve regional goals and incorporate student feedback, leading to creation of monthly magazine tailored to meet students needs during COVID
- Assessed staffing model and coached Regional Director on Regional volunteer succession planning
- Provided recommendations on strategic shifts to support volunteers' individual growth to achieve end-state vision
- Reinvigorated Regional social media accounts to drive additional virtual engagement during COVID-19, developing recommendations for increased communications

*Regional Director: Sashwata Goswami*

July 2014-Dec. 2015

- Served as principal deputy to the Regional Director, overseeing 17 chapters in Maryland, Virginia, and Washington D.C.

- Advised volunteers and chapters on fraternal policies, procedure and risk management issues
- Organized student Leadership Training, now known as Regional Assemblies, in tandem with Regional Director
- Assisted the Regional Manager of the Annual Chapter Report with the annual Regional audit of chapter submissions before submission to Fraternity Staff
- Achieved 100% compliance on volunteer training requirements for the Region

**Chapter Advisor, Omega Theta Chapter - University of Maryland**

Dec. 2015-May 2016

- Advised the chapter in matters of Fraternal policy & procedure, including budget, personnel, and best practices
- Monitored chapter progress towards completion of minimum standards of operations and administrative deadlines
- Supported risk mitigation through regular guidance with Executive Committee

Eastern & Mideast Regions - Prior to the 2014 strategic regional realignment

**Regional Manager – Annual Chapter Report, Eastern Region**

2012-2014

*The Annual Chapter Report was replaced with the Chapter Success Plan (CSP) in accordance with realigned Fraternal goals. The ACR allotted point values to chapter achievements, with the goal of 100,000 points to become a Chapter of the Year.*

- Advised and educated 20 chapters to help them understand and best utilize their Annual Chapter Report
- Used advanced metrics to track and analyze Regional and chapter-specific weaknesses to provide detailed improvement points to chapters and the Regional Management Team
- Average Regional ACR point total increase of over 11,000 points including two Chapters of the Year

**Chapter Advisory Board – Annual Chapter Report, Pi Sigma Chapter - George Mason University**

2012-2013

- Advised chapter Executive Vice President on maintenance of the ACR document and optimization of chapter events and operations, to achieve the highest point total possible

## **FRATERNITY EDUCATION & FACILITATION**

**Fraternity Advisor Conference**

- Attendee: *Indianapolis (2016, 2013)*

**Elevate** (formerly Principled Business Leadership Institute)

- Attendee: *Chicago (2023), Baltimore (2022), Boston (2020), Atlanta (2012), Philadelphia (2011)*
- Facilitator: *Atlantic City (2019), Boston (2018), Philadelphia (2017), Baltimore (2015), Philadelphia (2013)*

**Alpha Kappa Psi Convention**

- Attendee: *Miami (2022), New Orleans (2013)*
- Facilitator: *Dallas (2019), Las Vegas (2017), Norfolk (2015)*

**Alpha Kappa Psi Academy, Mu Class**

June 2012

- One of 18 students selected for all-expenses paid three-day leadership weekend

## **FRATERNITY HONORS & AWARDS**

**Silver Distinguished Service Award**

Feb. 2023

**Bronze Distinguished Service Award**

Feb. 2013

- Conferred on behalf of the Mideast Region, comprised of 27 collegiate chapters

**Fraternity Regional Manager of the Year, 2013–2014**

Feb. 2015

- Increased Eastern Region chapters' average ACR scores by over 11,000 of a possible 100,000 points
- Guided two chapters to achieve 100,000 points and become Chapters of the Year

**Regional Unity Award**

Feb. 2017

- Central Atlantic Region at Convention 2017 for highest percentage of chapters with 2+ student members registered

## **STUDENT MEMBER EXPERIENCE**

### **Omega Theta Chapter- University of Maryland**

#### **Director of Pledge Education**

2011-2012

- Educated two semesters of pledge classes, a total of 41 pledges, to learn Fraternity history, policy, and leadership
- Developed & instituted restructured quizzes to best prepare pledges for the Chapter's Midcourt & Court of Honor goals
- Implemented organized, objective way to track pledge performance while prioritizing transparency with the chapter
- Enforced Risk Management policy
- Coordinated with the Vice President of Pledging and the Director of Pledge Unity to form the Pledge Team

#### **Outstanding Brother Award, Omega Theta**

2011, 2012

- For chapter-level excellence throughout the academic year

#### **Treasurer, Theta Pledge Class**

2010

- Led Fundraising Committee to raise over \$1,000 during eight weeks of pledging

### **Regional-Level**

#### **Installation Team**

- Psi Delta Chapter - *Shenandoah University*
- Pi Sigma Chapter - *George Mason University*

2012

2011

#### **Brooklyn Bridge Award**

May 2011

- For exceptional service to the Pi Sigma Chapter at George Mason University during its colony period

# JANE AZZINARO

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## EXPERIENCE

### KEARNEY

*Manager, Digital & Analytics*

*Senior Associate, Digital Transformation*

**Washington, DC**

*January 2022 – Present*

*July 2021 – December 2021*

- **Coach.** Formally and informally mentor consultants on career progression, project performance and on-boarding
- **Diversity.** Led DC Women's Network, organizing and leading events and initiatives to support Kearney women and local female-owned businesses & non-profits; Facilitated panel of senior leaders for Forte recruitment event

### LEADING HI TECH & TELCO CLIENTS

- **Strategy:** Led mega supplier strategy development for high-spend IT professional services suppliers, identifying \$50M+ in run rate savings for critical Procurement initiative
- **Assessment.** Addressed third-party legal spend revealing a \$50M+ demand management opportunity – client immediately implemented initiatives to begin value capture
- **Facilitation:** Designed and facilitated workshops to define an enterprise supplier relationship management program
- **Operating Model:** Designed and tested external spend governance for Procurement function, resulting in enhanced operating model and playbook; client automated new processes and began integration with Finance

### PRIVATE EQUITY & FINANCIAL SERVICES CLIENTS

- **Sourcing:** Led strategic sourcing and mega supplier negotiations and subsequent contracting in partnership with Procurement and Legal for IT-related services for multiple clients
- **Value Assurance:** Designed and oversaw enterprise Transition Management Office and vendor app transition (~350) for Chief Technology Officer, tracking ~\$70M cost savings
- **Requirements.** Collaborated with Operations and Finance leaders to define business and technical requirements for new forecasting and cost model to facilitate sale of business division

### COGNIZANT CONSULTING

*Manager, Transformation Management*

*Senior Consultant, Digital Strategy + Organizational Change Management*

**Washington, DC | New York City, NY**

*April 2021 – July 2021*

*June 2019 – March 2021*

- Led strategic change development to enable successful enterprise-level organizational and digital transformations
- **Operating Model.** Co-created global service line operating model, maturity diagnostics, and consulting frameworks and playbooks for GTM delivery
- **Business Development.** Led cross-practice team to develop go-to-market offering, playbook and data-driven assessment for end-to-end transformations resulting in sales of \$1.2M+

### TOTAL REWARDS AND HR MERGERS & ACQUISITIONS

- **Project Management.** Mobilized, staffed and managed three-year roadmap for global transformation initiatives directly impacting 250k+ associates in ~50 countries
- **Executive Communication.** Advised HR SVP, constructed robust readouts for Board of Directors & C-Suite on confidential funding proposals >\$30M, and competitive analyses to inform strategic investment decisions
- **Governance.** Created strategies, plans and templates for consistent approach, branding and reporting of initiatives, providing recommendations for additional value creation and enhanced employee experience
- **Financials.** Developed, iterated and managed FY 2021 budget, including professional services and headcount projections

### DIGITAL TRANSFORMATION PROGRAM, HEALTHCARE PAYER/PROVIDER

- **Governance.** Crafted Executive-level readouts program-level status, project milestones and risks & impacts across 4 projects
- **Relationships.** Deep client relationships led to standing up two new initiatives
- **Org Design.** Developed Center of Excellence delivery model to leverage, integrate and deploy capabilities during follow-on work for 5 consultants on platinum-level account
- **Leadership.** Led operational readiness team of 10 driving all strategic change activities for core project impacting 4,000+ back office users through 4 successful go-lives
- **Process Efficiency.** Defined and established best-practice model for virtual end-user support community during COVID
- **Innovation.** Designed enterprise-level mapping and tracking tool for 1,400+ end users' data literacy needs for rollout of Tableau and 7 other new applications to support new data governance

# JANE AZZINARO

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## STRATEGIC ENGAGEMENTS

*MBA Consultant*

2017 – 2019

*Provided strategic and data-driven recommendations through teamwork and client partnerships*

- Coached 20 MBA students over 5 months, to present recommendations to 3 clients Berlin, Germany
- Market entry & growth strategy for Founding Farmers Restaurant Group Washington, DC
- Benchmarking strategy for county Arts and Industrial District creation Arlington, VA
- Operations & technology strategy for TBC Insurance, *Project Lead* Tbilisi, Georgia
- Foreign direct investment assessment for Siemens HCMC, Vietnam

## DELOITTE CONSULTING LLP

Rosslyn, VA

*Summer Associate, Senior Consultant, Strategy & Operations*

June 2018 – July 2018

- **Analysis.** Researched and organized comprehensive data on existing client programs for proposal effort
- **Hypothesis.** Studied feasibility of standardized domestic absentee vote-by-mail envelopes across all states and localities
- **Evaluation.** Created business case for application of new identity services solution by audience for Federal Agency

## J. AZZINARO CONSULTING, LLC

Silver Spring, MD

*Principal Consultant*

October 2016 – December 2020

*Worked with small and medium sized businesses to reinvigorate their approach to digital marketing*

- **Strategic Review.** Assessed six existing multi-channel marketing tactics to increase three-year business growth resulting in recommendation to increase operational efficiency before new investment to increase ROI
- **Process Improvement.** Reviewed seven business systems to streamline marketing and financial processes and decrease risk
- **Org Design.** Proposed organizational redesign of 10 employees based on stakeholder interviews and corporate limitations

## GLOBAL CONSULTANTS, LLC

Hanover, MD

*Digital Marketing Manager*

January 2013 – October 2016

- **Results.** Direct financial impact: Increased installed business from internet leads by over \$8M
- **Goal Oriented.** Spearheaded two successful campaigns for positive online reviews and higher email capture rates
- **Digital.** Organized and optimized pay-per-click campaigns with budgets in excess of \$25K per month; Established, maintained and cultivated social media presence; Implemented reputation management procedures to improve corporate image

## ACHIEVEMENTS

- Volunteer** Alpha Kappa Psi: Fraternity Board of Directors (Current: Vice Chair, Former: Secretary) August 2021 – Present  
Former Vice President of Chapter Development & Operations and Area III, Central Atlantic Regional Director, Regional Chief Operating Officer & more. Received National Awards
- Publications** How in-house legal teams can start using generative AI to capture value” (Kearney, 2023)  
“The secret to a successful digital transformation is talent, not tools” (Kearney, 2023)  
“Are ‘big law’ firms ready for a makeover” (The Hill, 2019)  
“Where Law Firm Partners Go When Changing Jobs” (Law360, 2019)
- Development** SAFe Agile Certified 2019;  
Deloitte Women’s Leadership Launch 2018, 1 of 79 women of 600 applicants from 36 MBA programs;
- Recognition** Global Master of Business Administration Leadership Award 2019, selected by peers;  
U.S. Chamber of Commerce Foundation Case Competition 2017, 2<sup>nd</sup> Place of 105 submissions from 42 programs;  
Forté Foundation: Edie Hunt Inspiration Award Nomination 2019, 1 of 63 nominations from 20 MBA programs
- Global View** Education Abroad: Vietnam, Georgia, Singapore, Malaysia, Australia, United Arab Emirates, & Uganda;  
Traveled to Netherlands, Germany, France, Spain, Italy, Hong Kong, Indonesia, Greece, Thailand, Turkey & more

# JANE AZZINARO

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## **EDUCATION**

### **THE GEORGE WASHINGTON UNIVERSITY, School of Business**

**Washington, DC**

*Master of Business Administration*

*May 2019*

- MBA Association: Elected Executive Vice President
- Mentoring & Immersion Program for Consulting: Highly competitive program with mentors from firms including McKinsey
- Outstanding Contributor Award: Selected by peers for MBA Leadership Award
- Graduate Assistant: Strategic Management for 60+ MBA students
- Forté Fellowship Scholarship

### **UNIVERSITY OF MARYLAND, Robert H. Smith School of Business**

**College Park, MD**

*Bachelor of Science, Marketing; Minor, Leadership Studies*

*December 2012*

- Capital One Internship Leadership Program: Selective year-long course with an impactful internship, culminating in building sustainable projects in Uganda with a women's micro-finance group
- Alpha Kappa Psi, Professional Business Fraternity, Omega Theta Chapter '10-Life



Lane Velayo, CAE »

## AWARDS, RECOGNITION & LEADERSHIP

**Director, Board of Directors** *AMC Institute*

**Secretary, Board of Directors** *Alpha Kappa Psi Professional Business Fraternity*

**'Top 40 Under 40' of Association Professionals** *Association Forum* **Diversity Executive Leadership Program** *American Society of Association Executives* **Executive of the Year** *Indiana Society of Association Executives*

**President, Board of Directors** *Indiana Society of Association Executives*

**Chairman, Council of State Executives** *National Association for Music Education*

## EDUCATION

June 2003 **University of Cincinnati, College of Business Cincinnati, Ohio**

- Bachelor of Business Administration in Marketing and Accounting

December 2008 **American Society of Association Executives**

- Certified Association Executive

**CEO/Owner, Synergos Association Management Company** *August 2017 - Present*

- 100% minority owned company
- 10%+ growth each year since 2017
- \$1M+ Revenue
- Accredited by the AMC Institute
- State, National and International clients
- Award winning work has been recognized by Meeting Professionals International, Indiana Society of Association Executives and other state and national organizations.

## RELATED PROFESSIONAL EXPERIENCE

**Executive Director, Indiana Music Education Association**

- Manage day to day operations of both Associations
- Organization was recognized by the National Association for Music Education for largest membership campaign in 2014
- Recognized by the Indiana Society of Association Executives Star Awards program multiple years
- Led brand re-launch in 2013
- Launched a 501c3 Foundation affiliate to help underwrite Music Education initiatives in Indiana

**Executive Director, Indiana and Greater Indianapolis Hotel & Lodging Associations (IHLA & GIHLA)**

- Represent the Hotel & Lodging Industry at events and activities throughout Indiana and nationally
- Lead grassroots governmental affairs work

**Director of Alumni Development, Alpha Kappa Psi Fraternity, Inc.**

- First full-time director hired by the Fraternity with the sole mission of developing alumni affinity
- Developed, and Implemented Alumni Program Strategic Plan affecting 150,000+ alumni internationally
- Worked with Board of Directors in determining direction for Fraternity Strategic Plan
- Developed and Implemented Building Fundraising Campaign
- Coordinated work with a core of volunteers and over 185 student chapters
- Edited and Developed communications to alumni base
- Interacted with vendors on Alpha Kappa Psi's affinity programs – branded credit card, discounts, etc

## ***David P. Wendroff, CFV, Life***

Alpha Kappa Psi  
Fraternal Resume

### ***Gamma Kappa Chapter at the University of Portland***

- 1979 – Initiated
- 1980-81 – Finance Committee Chair
- 1982 – Graduated and Life member

### ***Portland Alumni Chapter***

- 1982-83 - Treasurer
- 1983-84 - Vice-President
- 1984-86 - President

### ***Northwest Regional Director (Currently Pacific Northwest District)***

- 1987-92 - Northwest Regional Director

### ***Alpha Kappa Psi Fraternity Board of Directors***

- 1995-99 - Treasurer
- 1995-01 - Member of the Executive Committee
- 1999-01 - Chair of the Fraternity Board of Directors
- 2001-02 - Immediate Past Chair
- 2021-24 – Director

### ***Alpha Kappa Psi Foundation Board of Directors***

- 2004-07 – Director
- 2007-09 – Vice-Chair
- 2009-13 – Chair of the Foundation Board of Directors

### ***Other volunteer roles***

- 2007-08 - Co-Chapter Advisor Theta Chapter at Oregon State University
- 2008-09 - Chapter Advisory Board Theta Chapter
- 2002-06 - Dean, Alpha Kappa Psi University - Finance
- 2009-22 - Convention Volunteer Coordinator
- 2014-20 – Member Fraternity Ritual Team Member
- 2016-21 - Chair Building Initiative Steering Committee
- 2015-21 - Regional Manager-Finance for Pacific Northwest Region
- 2016-23 - Facilitator Fraternity Advisor Conference/Presidents Academy/Pathways

### ***Other accomplishments***

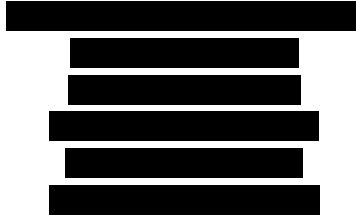
- Attended over 10 Chapter Installations
- Attended 19 Conventions
- Attended over 40 Success Institutes & PBLIs
- Attended Centennial Chapter Celebrations for Delta, Kappa, Theta & Rho
- Attended Dedication for Two AKPsi Headquarter Offices
- Sponsored CEO Office at Heritage Center
- Donated to Alpha Kappa Psi Foundation for over 31 years

- Member of Alpha Kappa Psi Foundation Clifford Spangler Society
- Leadership Circle Lifetime Giving Level for Alpha Kappa Psi Foundation
- President's Club Annual Giving Level Fiscal 2023
- Sponsored an Academy Fellow for 18 years

#### *Awards*

- 1992 – First Degree Silver Degree Distinguished Service Award from Gamma Kappa Chapter at University of Portland
- 2007 – Second Degree Silver Distinguished Service Award from Theta Chapter at Oregon State University
- 2013 - Gold Distinguished Service Award

## ***David P. Wendroff, CPA***



### ***Professional Experience***

#### ***Owner of David P. Wendroff, CPA (Oregon) in Florida from 1987 to current***

Providing CFO services to small and mid size privately held companies, and tax preparation services to individuals and corporations.

Services include:

- ◆ Financial analysis
- ◆ Monthly financial statements
- ◆ Account reconciliations
- ◆ Tax preparation
- ◆ Audit and review preparation
- ◆ Work paper preparation
- ◆ Management consulting
- ◆ Project support including securing bank loans, legal and insurance support.
- ◆ Member of clients' Board of Directors - responsible for providing strategic planning services and Treasurer and Secretary duties.

#### ***Chief Financial Officer for Wadeco, Inc. in Tualatin, Oregon from 1987 to current***

Manufacturer and distributor of large-scale agricultural irrigation and mining systems.

- ◆ Supervision of accounting department supervising 4-5 clerks & accounting managers
- ◆ Day to day financial operations
- ◆ Monthly closings for three divisions and 6 companies
- ◆ Account reconciliation
- ◆ Preparation of financial statements for board of directors and banks
- ◆ Negotiating bank lines of credit more than \$1 million
- ◆ Negotiating insurance contracts for general and product liability and other types of insurance
- ◆ Managing employee benefit plans
- ◆ Negotiating contracts for 401K plan, medical, dental, life and disability insurances
- ◆ Managing commercial rental operations for two multi-tenant manufacturing properties including negotiating leases
- ◆ Computer support for multi-user operating systems
- ◆ Manage multiple mainframe computer conversions
- ◆ Windows and other software support for company employees
- ◆ Sales department financial analysis and support
- ◆ Product line analysis
- ◆ Foreign sales project support including securing project financing or credit insurance from Export-Import Bank
- ◆ Managing credit department

- ◆ Meeting with foreign customers and creating turn-key financing options
- ◆ Strategic planning, financial projections, and budgeting
- ◆ Mergers and acquisitions

***Chief Financial Officer for R. M. Wade & Co. in Beaverton, Oregon from 1987 to current***

- ◆ Supervision of accounting department supervising up to 4-5 accounting clerks and accounting manager
- ◆ Day to day financial operations
- ◆ Monthly closings for four companies and multiple divisions
- ◆ Account reconciliation
- ◆ Preparation of financial statements for board of directors and banks
- ◆ Negotiating bank lines of credit and insurance contracts
- ◆ Managing commercial rental operations
- ◆ Managing employee benefit plans
- ◆ Negotiating contracts for 401K plan, medical, dental, life and disability insurances
- ◆ Computer support
- ◆ Sales department financial analysis
- ◆ Support and mergers and acquisitions

***Senior Auditor for KPMG Peat Marwick Main and Co. in Portland, OR from 1983 to 1987***

Big four accounting firm

- ◆ Supervision of staff, accountants, audits, and reviews of mid-size private companies
- ◆ Tax preparation for mid-size private companies

***Staff Accountant for Dietrich, Bye, Griffin and Youel in Portland from 1982 to 1983***

***Honors, Awards and Associations***

- ◆ **Certified Public Accountant**, licensed in State of Oregon since 1984
- ◆ **Past President**, Portland Chapter, Institute of Management Accountants
- ◆ **Past National Director**, Institute of Management Accountants
- ◆ **Past Chair of the Board of Directors and Executive Committee**, Alpha Kappa Psi Professional Business Fraternity
- ◆ **Past Chairman**, Alpha Kappa Psi Foundation
- ◆ **Gold Distinguished Service Award Recipient**, Alpha Kappa Psi Professional Business Fraternity
- ◆ **Member**, American Institute of Certified Public Accountants
- ◆ **Member**, Oregon Society of Certified Public Accountants
- ◆ **Member**, National Society of Tax Professionals
- ◆ **Member**, National Association of Tax Professionals

***Education and Training***

- ◆ **University of Portland**, Bachelor's Degree Business Administration in Accounting, 1982