

Jennifer Poyer

From: noreply@revize.com
Sent: Tuesday, February 20, 2024 7:52 PM
To: Bobbi Birk-LaBarge
Cc: Jennifer Poyer
Subject: [External] Committee/Commission Application
Attachments: Terry Lewis Birkett resume 2.2024.docx

text-1701264417967 = Terry Lewis-Birkett

text-1701264455677 = 1965 woodgate Ln

textarea-1701264479183 = tlewis429@gmail.com

text-1701264511253 = 715-660-6129

select-1705717723607[] = option-1

textarea-1701264736568 = . I: I believe I would be a good fit for this committee based on my Professional experience. I believe my experience and background will make me a valuable asset to this group.

textarea-1701264785218 = I have a degree in accounting and a masters degree in corporate finance. I have spent most of my career working in accounting/HR/payroll.

textarea-1701264828938 = I am currently the CFO for CAP Services in Stevens point.

date-1701264880178 = 2024-02-20

Client IP = 96.60.184.215

APC

Terry Lewis-Birkett

Tel: 715-660-6129 Email: tlewis429@gmail.com

Chief Financial Officer (February 2023 – present) **CAP Services, Inc.**, Stevens Point, WI

- Lead finance team
- Manage financial operations of the organization to ensure financial health and sustainability

Director of Finance and Operations (May 2015 – February 2023) **Great Kids, Inc.**, Wausau, WI

- Serve on the Leadership Steering Team developing a strategic plan for overseeing business management and planning for business and product development.
- Oversee fiscal, administrative and operational activities
- Prepare annual budget.
- Prepare weekly and monthly financial reports for the GKI Executive Leadership Group.

Accountant (January 2014 – May 2015) **Linetec**, Wausau, WI

- Learned the different roles within the finance department. The positions include General Ledger, Accounts Receivable, Credit and Collections, and Accounts Payable.
- Prepared month end analysis and reports for management.
- Worked on Sales Tax Audit that spanned four years.
- Use Epicor ERP software and Microsoft Excel.

Accounting Executive (Jun-2005 – January 2014) **Samoset Council, BSA**, Weston, WI

- Responsible for fiscal planning and management.
- Scope of responsibility includes preparing annual Council budget and managing budget throughout the fiscal year. Responsible for implementing cost saving strategies across the entire organization.
- Prepared grant budgets for United Way and other organizations.
- Successfully managed cash flow for 8 consecutive years without utilizing organization's line of credit.
- Prepare monthly financials and report to the Council CEO, Council Treasurer, and the Board of Directors.
- Plan, direct, and coordinate the annual audit. Ensure the audit is compliant with Boy Scouts of America's standards.
- First recipient of Samoset Council Golden Compass award for commitment to meeting and exceeding organizational goals.
- Part of the management team that helped Samoset Council achieve the status of #1 council in the nation for 2012.

- Experienced in use of QuickBooks, Microsoft Word, Microsoft Excel, Microsoft PowerPoint, and PeopleSoft Accounting software.

General Client Business Administrator (May-2003 - May-2005)

Vanden Heuvel CPAs, LLC, 5410 Rib Mountain Drive, Wausau, WI 54401

- Prepare corporate and individual tax returns with related schedules.
- Process client financial data including processing receivables/payables; general ledger entries; reconciling accounts; and preparing preliminary financial statement data.

Education

MBA

Upper Iowa University, Fayette, Iowa

Emphasis in Corporate Financial Management

Bachelor of Science

Upper Iowa University, Fayette, Iowa

GPA 3.85

Bachelor of Science Degree: Accounting