

## CITY OF TOMBALL

### APPLICATION FOR CITY BOARDS/COMMISSIONS/COMMITTEES

As an Applicant for a City Board, Commission, or Committee, your application will be public information. You will be contacted before any appointments are considered to confirm your continued interest in serving. All appointments are made by the Tomball City Council. Incumbents whose terms expire may be automatically considered for reappointment unless they indicate non-interest or have been appointed to two (2) consecutive terms. A member who is absent for more than 25% of called meetings in any twelve consecutive months or absent from more than two consecutive meetings, for other than medical reasons, will be automatically removed from service. Applicant must be a citizen of the United States and must reside within the city limits of Tomball unless otherwise stated in the position announcement. Applications will be kept on file for two years and will expire at the end of two years; for instance, an application dated in 2023 will expire in 2025.

Please Type or Print Clearly:

Name: Lori Wilson

Address: [REDACTED]

City/State/Zip [REDACTED]

Email: [REDACTED]

Date: 6/25/24

Phone: [REDACTED]  
(Home)

Phone: \_\_\_\_\_  
(Work)

Cell: [REDACTED]

I have lived in Tomball 23 years.

I am YES am not \_\_\_ a U.S. Citizen

Occupation: Director of Physician Relations at HCA Houston Healthcare Tomball - 7 years, Director of Employer Relations at HCA Houston Healthcare - Kingwood - 2 years. I grow service lines and support physician staff. I've worked in Hospitals and Healthcare since 2005.

Professional and/or Community Activities: Current Board member of the Tomball Regional Health Foundation since 2016. Past Chairman of the planning and Zoning Commission, starting on the board when it was just the Planning Commission, working with the City and Zoning Consultant to bring Zoning to Tomball in 2008. Past President ESD#8, which is a Harris County elected position, providing funding for NW EMS through our Board. Founding member of the Tomball Business Association and Walk Tomball. Former Therapy Pet Pal member with my 126 lb Golden Retriever, Samson, visiting Tomball Nursing Homes.

Additional Pertinent Information/References: John Ford - City of Tomball Councilman, Rob Marmorstein - CEO HCA Healthcare Tomball, Bruce Hillegeist - President and CEO of the Greater Tomball Chamber of Commerce, Timika Simmons, CEO of TOMAGWA, Jeffrey Klein, CEO Tomball Regional Health Foundation

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**Please attach a short biography to this application.**

**Briefly tell us why you would like to be considered for appointment to a City of Tomball Board/Commission.**

I have lived in Tomball for 23 years and I love my community. The TRHF Board has been expanding our charitable service lines and we are also in the midst of planning of our new building on Medical Complex. I think it is important that the Board is stable as we see this project through to completion.

It is an exciting time to be on the Board as we continue to support our community, and I would like to continue on as a Board member.

I appreciate your consideration.

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**Please complete the attached Conflict of Interest Questionnaire (CIQ), Conflict of Interest Statement (CIS), Board Member Election on Disclosure, and Appendix D (page 33) Acknowledgment of Receipt and Understanding from the Boards, Commissions, and Committees Handbook.**

**Applications for the following Council-appointed Boards, Commissions, and Committees will be kept on file in the City Secretary's office for two years.**

If you are interested in serving on more than one board, please indicate your preference by numbering in order of preference (i.e., 1, 2, 3, etc.)

Decision-Making Boards and Commissions

- Planning & Zoning Commission
- Board of Adjustments

Meeting Information

Second Monday each month, 6 p.m.  
To Be Announced; Evenings

Separate Legal Entities

- Tomball Economic Development Corporation

Meeting Information

Six (6) regular scheduled meetings, usually on the second Tuesday of the Month, 5:30 p.m.; the annual meeting is in May (special meetings may be called)  
Fourth Wednesday each month, 4 p.m.

- Tomball Regional Health Foundation

Ad Hoc/Advisory Committees

- Downtown Tomball Advisory Committee  
DTAC does not require Tomball residency

Meeting Information

As called

Non-profit Corporation Boards

- Tomball Legacy Fund, Inc.  
Position 7, Tomball Legacy Fund, does not require Tomball residency

Meeting Information

As called

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**I AM INTERESTED IN SERVING ON THE ABOVE-INDICATED BOARDS, COMMISSIONS,  
AND COMMITTEES.**



Digitally signed by Lori Wilson  
Date: 2024.06.25 10:13:41  
-05'00'

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Signature of Applicant

*(Must be signed/signature typed in)*

Please return this application to:

City Secretary  
City of Tomball  
401 Market Street  
Tomball, TX 77375  
[cso@tomballtx.gov](mailto:cso@tomballtx.gov)  
office: 281-351-5484  
fax: 281-351-6256

Attachments: Conflict of Interest Questionnaire  
Conflict of Interest Statement  
Election on Disclosure  
Acknowledgment of Receipt and Understanding (Page 33, Handbook)

**CONFLICT OF INTEREST QUESTIONNAIRE**  
For vendor doing business with local governmental entity

**FORM CIQ**

This questionnaire reflects changes made to the law by H.B. 23, 84th Leg., Regular Session.

This questionnaire is being filed in accordance with Chapter 176, Local Government Code, by a vendor who has a business relationship as defined by Section 176.001(1-a) with a local governmental entity and the vendor meets requirements under Section 176.006(a).

By law this questionnaire must be filed with the records administrator of the local governmental entity not later than the 7th business day after the date the vendor becomes aware of facts that require the statement to be filed. See Section 176.006(a-1), Local Government Code.

A vendor commits an offense if the vendor knowingly violates Section 176.008, Local Government Code. An offense under this section is a misdemeanor.

**OFFICE USE ONLY**

Date Received

**1** Name of vendor who has a business relationship with local governmental entity.

**2**  Check this box if you are filing an update to a previously filed questionnaire. (The law requires that you file an updated completed questionnaire with the appropriate filing authority not later than the 7th business day after the date on which you became aware that the originally filed questionnaire was incomplete or inaccurate.)

**3** Name of local government officer about whom the information is being disclosed.

\_\_\_\_\_  
Name of Officer

**4** Describe each employment or other business relationship with the local government officer, or a family member of the officer, as described by Section 176.003(a)(2)(A). Also describe any family relationship with the local government officer. Complete subparts A and B for each employment or business relationship described. Attach additional pages to this Form CIQ as necessary.

A. Is the local government officer or a family member of the officer receiving or likely to receive taxable income, other than investment income, from the vendor?

Yes  No

B. Is the vendor receiving or likely to receive taxable income, other than investment income, from or at the direction of the local government officer or a family member of the officer AND the taxable income is not received from the local governmental entity?

Yes  No


**5** Describe each employment or business relationship that the vendor named in Section 1 maintains with a corporation or other business entity with respect to which the local government officer serves as an officer or director, or holds an ownership interest of one percent or more.

**6**  Check this box if the vendor has given the local government officer or a family member of the officer one or more gifts as described in Section 176.003(a)(2)(B), excluding gifts described in Section 176.003(a-1).

**7**

\_\_\_\_\_  
Signature of vendor doing business with the governmental entity

\_\_\_\_\_  
Date

  
Lori Wilson

6-25-24

**CONFLICT OF INTEREST QUESTIONNAIRE**  
**For vendor doing business with local governmental entity**

A complete copy of Chapter 176 of the Local Government Code may be found at <http://www.statutes.legis.state.tx.us/Docs/LG/htm/LG.176.htm>. For easy reference, below are some of the sections cited on this form.

**Local Government Code § 176.001(1-a):** "Business relationship" means a connection between two or more parties based on commercial activity of one of the parties. The term does not include a connection based on:

- (A) a transaction that is subject to rate or fee regulation by a federal, state, or local governmental entity or an agency of a federal, state, or local governmental entity;
- (B) a transaction conducted at a price and subject to terms available to the public; or
- (C) a purchase or lease of goods or services from a person that is chartered by a state or federal agency and that is subject to regular examination by, and reporting to, that agency.

**Local Government Code § 176.003(a)(2)(A) and (B):**

(a) A local government officer shall file a conflicts disclosure statement with respect to a vendor if:

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(2) the vendor:

(A) has an employment or other business relationship with the local government officer or a family member of the officer that results in the officer or family member receiving taxable income, other than investment income, that exceeds \$2,500 during the 12-month period preceding the date that the officer becomes aware that

- (i) a contract between the local governmental entity and vendor has been executed;
- or
- (ii) the local governmental entity is considering entering into a contract with the vendor;

(B) has given to the local government officer or a family member of the officer one or more gifts that have an aggregate value of more than \$100 in the 12-month period preceding the date the officer becomes aware that:

- (i) a contract between the local governmental entity and vendor has been executed; or
- (ii) the local governmental entity is considering entering into a contract with the vendor.

**Local Government Code § 176.006(a) and (a-1)**

(a) A vendor shall file a completed conflict of interest questionnaire if the vendor has a business relationship with a local governmental entity and:

- (1) has an employment or other business relationship with a local government officer of that local governmental entity, or a family member of the officer, described by Section 176.003(a)(2)(A);
- (2) has given a local government officer of that local governmental entity, or a family member of the officer, one or more gifts with the aggregate value specified by Section 176.003(a)(2)(B), excluding any gift described by Section 176.003(a-1); or
- (3) has a family relationship with a local government officer of that local governmental entity.

(a-1) The completed conflict of interest questionnaire must be filed with the appropriate records administrator not later than the seventh business day after the later of:

- (1) the date that the vendor:
  - (A) begins discussions or negotiations to enter into a contract with the local governmental entity; or
  - (B) submits to the local governmental entity an application, response to a request for proposals or bids, correspondence, or another writing related to a potential contract with the local governmental entity; or
- (2) the date the vendor becomes aware:
  - (A) of an employment or other business relationship with a local government officer, or a family member of the officer, described by Subsection (a);
  - (B) that the vendor has given one or more gifts described by Subsection (a); or
  - (C) of a family relationship with a local government officer.

  
Lori Wilson

6-25-24

**LOCAL GOVERNMENT OFFICER CONFLICTS  
DISCLOSURE STATEMENT**

**FORM CIS**

(Instructions for completing and filing this form are provided on the next page.)

This questionnaire reflects changes made to the law by H.B. 23, 84th Leg., Regular Session.

This is the notice to the appropriate local governmental entity that the following local government officer has become aware of facts that require the officer to file this statement in accordance with Chapter 176, Local Government Code.

**OFFICE USE ONLY**

Date Received

- 1 Name of Local Government Officer
- 2 Office Held
- 3 Name of vendor described by Sections 176.001(7) and 176.003(a), Local Government Code

4 Description of the nature and extent of each employment or other business relationship and each family relationship with vendor named in item 3.

5 List gifts accepted by the local government officer and any family member, if aggregate value of the gifts accepted from vendor named in item 3 exceeds \$100 during the 12-month period described by Section 176.003(a)(2)(B).

Date Gift Accepted \_\_\_\_\_ Description of Gift \_\_\_\_\_

Date Gift Accepted \_\_\_\_\_ Description of Gift \_\_\_\_\_

Date Gift Accepted \_\_\_\_\_ Description of Gift \_\_\_\_\_

(attach additional forms as necessary)

6 **SIGNATURE** I swear under penalty of perjury that the above statement is true and correct. I acknowledge that the disclosure applies to each family member (as defined by Section 178.001(2), Local Government Code) of this local government officer. I also acknowledge that this statement covers the 12-month period described by Section 176.003(a)(2)(B), Local Government Code.

\_\_\_\_\_  
Signature of Local Government Officer

**Please complete either option below:**

**(1) Affidavit**

NOTARY STAMP / SEAL

Sworn to and subscribed before me by \_\_\_\_\_ this the \_\_\_\_\_ day of \_\_\_\_\_

20 \_\_\_\_\_, to certify which, witness my hand and seal of office.

Signature of officer administering oath

Printed name of officer administering oath

Title of officer administering oath

OR

**(2) Unsworn Declaration**

My name is \_\_\_\_\_ and my date of birth is \_\_\_\_\_

My address is \_\_\_\_\_

(street) (city) (state) (zip code) (country)

Executed in \_\_\_\_\_ County, State of \_\_\_\_\_, on the \_\_\_\_\_ day of \_\_\_\_\_ 20\_\_\_\_

(month) (year)

\_\_\_\_\_  
Signature of Local Government Officer (Declarant)

*[Handwritten Signature]*  
Keri Wilson - 6-25-24

## LOCAL GOVERNMENT OFFICER CONFLICTS DISCLOSURE STATEMENT

Section 176.003 of the Local Government Code requires certain local government officers to file this form. A "local government officer" is defined as a member of the governing body of a local governmental entity; a director, superintendent, administrator, president, or other person designated as the executive officer of a local governmental entity; or an agent of a local governmental entity who exercises discretion in the planning, recommending, selecting, or contracting of a vendor. This form is required to be filed with the records administrator of the local governmental entity not later than 5 p.m. on the seventh business day after the date on which the officer becomes aware of the facts that require the filing of this statement.

A local government officer commits an offense if the officer knowingly violates Section 176.003, Local Government Code. An offense under this section is a misdemeanor.

Refer to chapter 176 of the Local Government Code for detailed information regarding the requirement to file this form.

### INSTRUCTIONS FOR COMPLETING THIS FORM

*The following numbers correspond to the numbered boxes on the other side.*

- 1. Name of Local Government Officer.** Enter the name of the local government officer filing this statement.
- 2. Office Held.** Enter the name of the office held by the local government officer filing this statement.
- 3. Name of vendor described by Sections 176.001(7) and 176.003(a), Local Government Code.** Enter the name of the vendor described by Section 176.001(7), Local Government Code, if the vendor: a) has an employment or other business relationship with the local government officer or a family member of the officer as described by Section 176.003(a)(2)(A), Local Government Code; b) has given to the local government officer or a family member of the officer one or more gifts as described by Section 176.003(a)(2)(B), Local Government Code; or c) has a family relationship with the local government officer as defined by Section 176.001(2-a), Local Government Code.
- 4. Description of the nature and extent of each employment or other business relationship and each family relationship with vendor named in item 3.** Describe the nature and extent of the employment or other business relationship the vendor has with the local government officer or a family member of the officer as described by Section 176.003(a)(2)(A), Local Government Code, and each family relationship the vendor has with the local government officer as defined by Section 176.001(2-a), Local Government Code.
- 5. List gifts accepted, if the aggregate value of the gifts accepted from vendor named in item 3 exceeds \$100.** List gifts accepted during the 12-month period (described by Section 176.003(a)(2)(B), Local Government Code) by the local government officer or family member of the officer from the vendor named in item 3 that in the aggregate exceed \$100 in value.
- 6. Signature.** Signature of local government officer. Complete this section after you finish the rest of this report. You have the option to either: (1) take the completed form to a notary public where you will sign above the first line that says "Signature of Local Government Officer" (an electronic signature is not acceptable) and your signature will be notarized, or (2) sign above both lines that say "Signature of Local Government Officer (Declarant)" (an electronic signature is not acceptable), and fill out the unsworn declaration section.

**Local Government Code § 176.001(2-a):** "Family relationship" means a relationship between a person and another person within the third degree by consanguinity or the second degree by affinity, as those terms are defined by Subchapter B, Chapter 573, Government Code.

**Local Government Code § 176.003(a)(2)(A):**

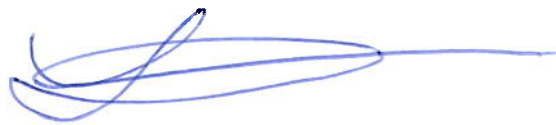
- (a) A local government officer shall file a conflicts disclosure statement with respect to a vendor if:

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- (2) the vendor:

(A) has an employment or other business relationship with the local government officer or a family member of the officer that results in the officer or family member receiving taxable income, other than investment income, that exceeds \$2,500 during the 12-month period preceding the date that the officer becomes aware that:

- a contract between the local governmental entity and vendor has been executed; or
- the local governmental entity is considering entering into a contract with the vendor.

  
Lori Wilson 6-25-24



## Board Member Election on Disclosure

An appointed Board Member may choose whether or not to allow public access to the information in the custody of the City relating to the Board Member's home address, home telephone number, cellular and pager numbers (if not paid for by City), emergency contact information, personal email address, and information that reveals whether the person has family members.

Each Board Member shall state his/her choice in writing to the City Secretary's Office. If a Board Member elects not to allow public access to this information, the information is protected by Sections 552.024 and 552.117 of the Public Information Act and rulings of the Texas Attorney General. If a Board Member fails to report his/her choice, the information may be subject to public access.

If during the course of their term a Board Member wishes to close or open public access to the information, the individual may request in writing to the City Secretary's Office to close or open access as the case may be. A Board Member may request to close or open public access to the information by submitting a written request to the City Secretary's Office. Only the City Secretary's Office is allowed to disclose the information listed above.

**(Please strike through any information that you do not wish to be made accessible to the public)**

Please complete the information below and return  
to the City Secretary's Office within fourteen days of receipt.

I **DO** elect public access to my: (please indicate items you would like available, if any)

\_\_\_ home address

\_\_\_ home telephone number

\_\_\_ personal email address

\_\_\_ cell or pager numbers not paid for by the City

\_\_\_ emergency contact information

\_\_\_ information that reveals whether I have family members.

I **DO NOT** elect public access to my home address, home telephone number, cell or pager numbers, emergency contact information, or any information that reveals whether I have family members.

Digitally signed by Lori Wilson  
Date: 2024.06.25 10:16:08 -05'00'

Board Member's Signature

June 25, 2024

Date

Lori Wilson

Board Member's Printed Name



**Appendix D**

**Acknowledgment of Receipt and Understanding**

I acknowledge that I have received a copy of the City of Tomball Boards, Commissions and Committees Handbook on 8-25-24 from Website (date).

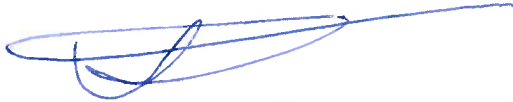
I understand the eligibility requirements, policies, and procedures set forth in this Handbook.

I have read and understood the contents of this handbook and will act in accordance with these eligibility requirements, policies and procedures as a condition of my appointment to a board, commission, or committee.

I have read and understood the Standards of Conduct expected by the City of Tomball and I agree to act in accord with the Standards of Conduct as a condition of my appointment by the City of Tomball.

Finally, I understand that the contents of this Handbook are policies and guidelines established by the City Council of the City of Tomball and that the City Council may amend the Handbook at its discretion.

Please read this Handbook carefully to understand these conditions of appointment before you sign this document.



\_\_\_\_\_  
Signature of Applicant for Appointment



\_\_\_\_\_  
Printed Name of Applicant

June 25, 2024

\_\_\_\_\_  
Date:

**Lori Wilson Bio – Tomball Regional Health Foundation Board**

I feel I bring several strong capabilities to the Tomball Regional Health Foundation.

- Healthcare background since 2005
- Homeowner in the City of Tomball since 2001
- Many years of community involvement
- Deep knowledge of the Tomball community
- Strong relationships with community leadership
- Robust relationship building skills

As a TRHF Board member I bring experienced and common sense thoughts to the agenda items we discuss. Our Board has deep respect for one another and feel comfortable speaking our minds and considering other's opinions. The welfare and support to the communities we fund are always the primary focus of any of our discussions, as well as staying within the boundaries of our mission statement.

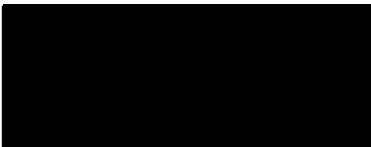
We are currently finalizing plans to build on Medical Complex Drive and the stability and experience of our Board is important as we work together to make many decisions for this large project. Also, we have changed our funding processing, and scope of charitable organizations, and I am excited to see these endeavors continue to grow.

I would like to ask to continue as a Board member for the Tomball Regional Health Foundation to be a part of the continuity of the projects we are currently working on, as well as the plans we have to further our charitable funding deeper into our communities.

Thank you,



Lori Wilson



# LORI WILSON

## SUMMARY

Results-driven professional with progressive experience and accomplishment in selling, managing, and increasing key internal and external client relationships. Strategic and visionary leader with a track record of developing and executing plans to impact a company's vision, revenue, and profit goals. Self-driven and motivated, blended with strong business, leadership, relationship, sales/marketing, consultative selling, communication, problem solving, and product development/marketing collaboration skills.

- Vision, Strategy & Execution
- Relationship & Consultative Selling
- Oral, Written, & Presentation Skills
- New Product Development & Launch
- Client Relationship Management
- Executive Presentations & Negotiations
- Project Management & Marketing Events
- Competitive Analysis & Account Strategies

## KEY ACCOMPLISHMENTS

- Gifted in creating, building, enhancing and maintaining relationships with C-level executives, internal and external clients
- Top producer with multiple awards during career including President's Club, National Sales Leader and Super-Achiever
- Proven history of exceeding quotas and revenue volume goals year-over-year in extremely competitive and demanding environments
- Successful experience developing marketing strategies and assisting in product and service line launch/rollouts

## PROFESSIONAL EXPERIENCE

HCA HEALTHCARE (Hospital Corp of America) – Houston, Texas 3/15 - Present  
*At its founding in 1968, Nashville-based HCA was one of the nation's first hospital companies. Today, we are the nation's leading provider of healthcare services, a company comprised of locally managed facilities that includes 185 hospitals and 2,000+ sites of care in 20 states and the UK, employing approximately 275,000 people.*

**Director of Physician Relations - Generalist, HCA Houston Healthcare Tomball** 07/17 - Present  
Develop and retain customer relationships to drive business growth for key hospital service lines. Serve as an extension of hospital leadership and operations, focusing on key internal and external customers to grow hospital volumes (Orthopedics, Spine Surgery, Cardiovascular, Surgery, Bariatrics, Podiatry, Pain Mgmt, PCP, GI, OBGYN, Pulmonology, Neurology, Oncology, and Breast surgery). Preserve relationships between physicians and O Suite by building strong and trusted relationships. Proficient in working within an integrated hospital organization.

**Director of Employer Relations, HCA Houston Healthcare Kingwood** 03/15 – 07/17  
Build and maintain business relationships that drive business back into the hospital system. Create strong relationships with insurance brokers and consultants in order to gain access to commercially insured groups. Provide top employers with information on hospital service lines, strengths and benefits. Garner solid relationships with hospital executives, directors and staff in order to understand service lines, culture, and strategies.

THE METHODIST HOSPITAL SYSTEM, Houston, Texas 12/09 – 02/15  
*The Methodist Hospital System is comprised of a leading academic medical center in the Texas Medical Center and four community hospitals serving the greater Houston area.*

**Wellness Consultant, Houston, Texas**  
Build and maintain business relationships with national and local corporate accounts, primarily in the Texas market. Plan, manage, and execute strategies to impact the company's market position in a niche industry. Consult with C-level executives, human resource management, insurance carriers and broker partners. Develop relationships, identify needs, and deliver multiple informal and Power Point presentations with end-to-end solutions, to win new business opportunities, as well as maintaining and increasing current business. Manage diverse relationships, at multiple levels, as well as negotiate contracts and contract renewals. Responsible for strategic management of sales goals, and implementing plans to exceed those targets. Maintain and utilize contact management software.

- Generate wide range of successful strategic partnerships with large and mid-sized corporate clients
- Key strategist and sales/marketing leader in delivering relevant wellness solutions
- Successfully deliver comprehensive wellness and life style management programs while building a return on investment and reducing bottom line expenses for client base

- Achieve long term relationships with corporate clients of all sizes as well as insurance consultants and brokers. Texas Department of Insurance Licensed General Lines Agent and Life and Health Insurance Counselor since 2007.
- Proven track record of successfully bidding \$100K plus contracts

LIFE TIME FITNESS, Houston, Texas

03/05 – 12/09

*\$350 million company specializing in wellness services and solutions for corporate clientele*

**Regional Corporate Wellness Director, Houston, Texas**

Constructed and sustained strong relationships with national insurance carriers, national brokers and corporate accounts in the Texas market. Maintained sturdy relationships with insurance carriers, broker partners and C-level executives, developed relationships, identified needs, and delivered solutions. Provided expertise to various departments within an organization to coordinate a unique and appropriate wellness strategy. Negotiated contracts/contract renewals and set up trade show marketing events to create company awareness.

- Achieved successful business partnerships with a diverse range of corporate clients, insurance consultants and brokers
- Delivered significant new revenue in the Texas market
- Completed and implemented knowledge from Consultative Sales training
- Successfully delivered comprehensive wellness and life style management programs in conjunction with insurance carrier and broker representatives while building a return on investment and reducing bottom line expenses for client base
- Recognized as one of the leading Regional Directors in the company for managing positive relationships that drive large employers toward utilizing wellness services and successfully impacting their revenue in a very competitive industry.
- Collaborated with product development on market strategy and positioning for the first-ever full-service insurance brokerage launch supported by a nationwide health and fitness network
- Developed and implemented marketing strategies for e-mail campaigns and print marketing materials
- Established relationships and won new business with large corporate accounts, brokers and insurance carriers

RICOH AMERICAS CORP., Houston, Texas

11/02 – 03/05

*\$3 Billion in Sales Annually Diversified Office Automation Equipment and Electronics Provider*

**Senior Account Executive**

Managed new business development selling copiers, printers, faxes and document management systems. Built and maintained relationships with owner/C-level contacts, identified needs, detailed products, delivered multi-channel presentation, as well as negotiated contracts and long-term agreements. Implemented cold calling strategies to develop new leads and impacted revenue by building positive partner relationships.

- Image Management Consultant Certification
- Certified Document Image Architect Certification
- Ricoh University Student
- Color Management Certified - Solution Selling Certified - Production Selling Certified
- Managed direct relationships with channel partners in a very competitive industry
- Played key role in driving business by collaborating with product development and IT teams to build custom-designed document management systems for clients

AMERICAN BUSINESS MACHINES, Houston, Texas

09/01– 11/02

*Established 1954 – Diversified Office Automation Equipment and Electronics Provider*

**Senior Account Executive**

Managed new business development for a Houston territory, selling copiers, printers, faxes and document management systems. Built and maintained relationships with owner/C-level contacts, identified needs, detailed products, delivered multi-channel presentation, as well as negotiated contracts. Implemented cold calling strategies to develop new leads and impacted revenue by building positive partner relationships.

- \$100,000 of the Month Club
- Minolta Professional Sales/Action Selling Certified
- Achieved forecasted sales quota regularly
- Instrumental in developing new business revenue by 7% a year

MARK OF DISTINCTION, Houston, Texas  
*Established 1988 - Addressing, folding/inserting, and mailing equipment*

5/00 – 08/01

**Account Executive**

Managed sales/new business development in the Houston market for the large mailing/addressing, folding/inserting equipment. Prospected leads and developed relationships with C-level contacts, responded to RFPs, developed detailed business cases, negotiated pricing and contract specifications, and influenced decisions to close new business opportunities.

- Salesperson of the Month for 6 sales cycles
- Member of various postal/printing organizations

OFFICEMAX, Prescott, Arizona  
**Major Account Executive**  
Managed Catalog Sales for all of Northern Arizona

3/97 – 5/00

IKON OFFICE SOLUTIONS, Prescott, Arizona  
**Sales Consultant**  
Copier/Fax Sales for Prescott Arizona territory

9/96 – 3/97

MINOLTA BUSINESS SYSTEMS, Houston, Texas  
*Diversified Office Automation Equipment and Electronics Provider*

4/91 – 8/96

- Successful management of three hundred-fifty existing clients for over five years.
- Achievement of number one sales representative in the Houston office out of twenty-four representatives 10 times
- Super-Achiever Award - 1995-1996
- Awarded Minolta President's Club trip for 1992 (Puerto Rico), 1993 (Scotland), and 1994 (Monte Carlo), 1995 (Caribbean Cruise).

**EDUCATION**

**Bachelor's degree – Business Administration – LeTourneau University - 2005**

\*Summa Cum Laude  
\*Alpha Sigma Lambda

**Associate's degree – Marketing – North Harris Montgomery College - 1996**

\*Phi Theta Kappa

**COMMUNITY SERVICE**

**Planning and Zoning Commission – Tomball – Chairman – 2007 to 2013**

**Emergency Services District #8 Commissioner – President (Elected Official) – 2007 to 2014**

**Tomball Business Association – Vice President – Communications – 2007 to 2010**

**Guest Business Columnist – Tomball/Magnolia Potpourri (HCN) – 2007 to 2010**

**Tomball Regional Health Foundation Board Director – 2016 – Present**

**East Montgomery County Chamber of Commerce Director – 2016 - 2017**