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OBJECTIVE

Dedicated and experienced accounting professional and teacher with proven success managing finances for mid-sized commercial companies. Seeking an opportunity to apply my experience to drive positive change in the community.

EXPERIENCE

Lecturer – University of Dayton, Dayton, Ohio, January 2021 – Present

- Taught Introduction to Managerial Accounting (ACC208) to second and third year students
- Taught Intermediate Managerial Accounting (ACC 303) to second, third, and fourth year students
- Assisted with completing the FY'22 budget for the School of Business Administration
- Participated on the MBA Task Force starting September '21 to Dec '22
 - Made various recommendations to stimulate demand for the degree and improve program profitability including waiving some foundational course requirements to lower student cost, providing a 5th year MBA option, including more experiential learning opportunities and designing new concentrations, and pursuing non-degree professional development opportunities like micro-credentials
- Participated on the CSIT Aligning Cost with Scale of Academic Enterprise Committee starting Jan '22 to Jan '23.
 - Recommended new presentation of internal financial statements separating common governance costs from revenue, variable costs, and traceable fixed costs by operating segment
 - Allows for better understanding of overall enterprise margin changes and the development of key management metrics like student enrollment breakeven points and costs per student at the segment level
- Faculty advisor to Flyers for Financial Literacy student service group
 - Help students create materials to educate fellow students on campus about financial life skills like budgeting, saving, and investing for the future
 - Help students create impactful presentations regarding financial literacy topics that will resonate and increase financial life skills with student audiences and audiences in the greater Dayton area

Adjunct Instructor – University of Dayton, Dayton, Ohio, January 2019 – December 2020

- Taught Introduction to Managerial Accounting (ACC208) to second and third year students

Director of Digitalization – Pilot Chemical Corp, West Chester, Ohio, March 2019 – January 2021

RECENT ACCOMPLISHMENTS

- Created a strategic road map to leverage recent advances in technology and data analytics to enhance our customers' experience and create efficiencies and effectiveness in the company's business and manufacturing processes
- Managed a team who created a suite of data visualization tools using Microsoft PowerBI to help create insights around sales mix, volumes and margins, customer satisfaction, environmental impact data, manufacturing batch cost, product quality, material yield, financial and operational performance by department, and customer churn.
- Created a predictive maintenance model for a reactor using production control system data and logistic regression.

Business Director – Pilot Chemical Corp, Sharonville, Ohio, Jan 2017 – March 2019

ACCOMPLISHMENTS

- During the first year leading the Commercial organization, the Company's sales performance and profitability measured by EBITDA increased by 13% and 15% from prior year, respectively
- Changed management style from a "chess master" autocratic style to decentralized, member empowered style

- Coordinated customer communications during supply disruptions caused by Hurricane Harvey
- Led the company's primary business functions including Sales, Marketing, Business Line Management for anionic surfactants and biocide product portfolios, New Business Development, and Business Analysis.
- Crafted strategies and initiatives to meet the long-term goals of the company for growth and profitability including developing Customer strategies, developing executive relationships, and understanding key market trends while promoting the Company to the marketplace.
- Managed 9 direct reports with 25 people total in the team

Chief Financial Officer - Pilot Chemical Corp, Sharonville, Ohio, June 2014 – Dec 2016

ACCOMPLISHMENTS

- Led company's transition from C-Corp to S-Corp and set up IC-DISC entity for owner resulting in favorable tax strategy
- Led the valuation of, negotiation for, financing of, and integration of two acquisitions
- Built the Cincinnati-based Finance & Accounting team from the ground up.
- **Planning**
 - Led, in conjunction with the Leadership team, the development of a strategic direction for the business along with supporting tactics.
 - Monitored the progress of the company in meeting its strategic goals.
 - Oversaw the formulation of the annual budget.
 - Supported and implemented a standardized system of performance metrics that supported the company's strategic direction.
- **Operations**
 - Managed the Company's accounting, treasury, tax, and legal functions.
 - Participated in the functions and decisions of the executive management team.
 - Engaged in acquisition vetting, selection, purchase negotiations, and acquisition integration into the business.
- **Financial Information**
 - Oversaw the compilation of financial information into financial statements with accompanying disclosures in a timely and accurate fashion.
 - Responsible for the annual financial audit.
 - Reported financial results to management, the board of directors, and shareholder.
- **Risk Management**
 - Administered company's risk management program to ensure cost effective insurance coverage at the proper levels for liability, pollution, workers' comp, D&O, property, and business interruption.
 - Reported risk issues to the board of directors.
 - Ensured that the business complied with all regulatory and other legal requirements.
 - Monitored known legal issues involving the company as well as legal issues impacting the chemical industry.
 - Reviewed and acted upon the findings and recommendations of internal and external auditors.
- **Financing**
 - Monitored projected cash balances.
 - Arranged for financing to meet future cash requirements.
 - Managed banking relationships including ensuring timely required filings (quarterly covenant compliance certificates and quarterly forecasts) and maintained adequate, cost effective debt facilities.
- **Corporate Responsibilities**
 - Actively participated and was a member of the Business Leadership Team, the Executive SIOP and the Corporate Quality Committee.
 - Managed annual stock valuation activities.
 - Responsible for the evaluation of all capital projects and active participation on the Capital expenditures team to ensure proper financial justification > \$25k
 - Prepared annual companywide budgets and revisions when needed.
 - Prepared and presented quarterly financial reports to Board of Directors.
 - Responsible for all financial reporting and income tax compliance issues.
 - Established and maintained effective system of internal controls.

- Responsible for planning, filing, and compliance issues related to all taxes (property, payroll, sales & use)
- Refined accounting processes to leverage ERP system capabilities.

Director of Finance & Accounting – Pilot Chemical Corp, Sharonville, Ohio, Feb. 2008 – June 2014

- Responsible for all financial operations including compilation and analysis of monthly and quarterly internal financial statements and annual audited financial statements
- Responsible for treasury function including maintaining banking relationships, treasury services, credit packages, and risk management
 - Negotiated 3 credit agreements inside 18 months due to acquisitions and recapitalization of the business from \$25M to \$170M
 - Manage company's insurance including various liability policies and property and casualty policies
- Led due diligence and integration of \$100M specialty chemical company during 2013
- Led company's strategic planning process
 - Leveraging value-based management (VBM) principles, lead 26-member team who created company's 10-year strategic plan in 2010
 - Analyzed company's strengths & weakness, analyzed competitors' strengths & weaknesses, constructed strategic alternatives, and evaluated alternatives using qualitative and financials models
 - Recommended strategies based on alignment with company strengths and best financial return
 - Resulted in a \$40M CapEx investment to optimize our manufacturing footprint and a \$91M acquisition to extend our product lines
 - Update resulting business plan annually
- Led various continuous improvement initiatives including reducing accounting close cycle times from 9 days to 5 days and increasing financial transparency across functions
- Lead budgeting efforts at the departmental through the company level
- Manage professional staff of 10

Controller – Pilot Chemical Corp, Sharonville, Ohio, Dec. 2005 – Feb 2008

- Responsible for all facets of financial statements – financial reporting, cost accounting, tax
- Managed relocation of finance function from Los Angeles to Sharonville including
 - hiring new Accounting team in Cincinnati (Accounting Mgr., A/P clerk, A/R clerk, Payroll clerk, & staff accountant)
 - learning and documenting processes in LA office and subsequently training new Cincinnati team
 - managed LA staff to separation
- Managed Accounting staff of 6
- Constructed product line profitability schedules
- Participated in ERP implementation team
 - Designed cutover plans and implementation plans
 - Installed ERP in 5 plants plus the corporate office
- Facilitated 2 IRS audits

Cost Accounting Manager – A.O. Smith, Inc., Tipp City, Ohio, May 2005 – December 2005

- Analyze product line profitability
- Maintain raw material standards for all product lines
- Analyze actual vs. standard variances including purchase price variances and material usage variances
- Construct quarterly LIFO analysis

Manager of Financial Reporting - Relizon, Dayton, Ohio, Feb. 2004 – May 2005

- Manage monthly, quarterly, and annual financial reporting including statement compilation and footnote disclosure regarding debt, intangible assets, pensions, leases, stock option compensation, and business segment information
- Manage quarterly debt covenant reporting
- Maintain general ledger system and management monthly general ledger transaction processing

- Coordinate and facilitate annual financial statement audit and quarterly financial statement reviews with external auditors
- Lead process documentation project to validate or enhance effective controls in financial reporting process as required by Sarbanes-Oxley
- Support business segment divestiture efforts by creating full “carve out” financial statements including footnotes for business segment and coordinating a related audit of segment financials

Manager of Financial Planning & Analysis - Relizon, Dayton, Ohio, Feb. 2003 – Feb 2004

- Planned, compiled, administered, and reconciled to corporate performance targets annual business plan for a \$800 million, 4 division company
- Maintained and summarized monthly account profitability for 100 largest customers and explain significant changes to Senior Management
- Quantified sales offers to customers and made financial recommendations to sales organization to improve margins or to improve offer to customer to secure business
- Quantified changes to sales commission program through sensitivity analysis of commission payment variables such commission pay % and cost surcharge changes resulting in a \$2.5M savings
- Monthly analyzed division financial performance and summarized significant variances to plan for Senior Management including sales, cost of sales, G&A costs, and compensation

- Quarterly analyzed and summarized current quarter to prior year current quarter variances, and current quarter to prior quarter variances to Senior Management including sales, cost of sales, G&A costs and compensation
- Streamlined various quarterly analysis reports and budget to actual analysis reports through Microsoft Access
- Completed various ad hoc reports for Senior Management as needed such as 8 quarter comparative Sales Office financial report, 3 year comparative actual to quota report for the sales field

Cost Accounting Manager - Reynolds & Reynolds/Relizon, Dayton, Ohio, Oct. 1997 – Feb. 2003

- Managed a staff of 6 professionals who compile and analyze monthly financial statements for 10 manufacturing plants and 20 distribution centers. Compilation & analysis includes sales, cost of sales, raw material and finished goods inventory valuation, labor and overhead, material usage variances, and labor efficiency variances.
- Constructed a job-costing model used in the electronic printing & mailing centers.
- Constructed and implemented a cycle count program across the manufacturing network.
- Managed annual physical inventory processes for 10 plants including planning, staffing, observation, and reconciliation activities.
- Managed budget process for plant spending and division cost of sales.
- Led project to automate financial statement analysis by capturing raw general ledger data in electronic format and summarizing it using Microsoft Access
- Led various projects to streamline accounts payable reporting, payroll reporting, and plant depreciation expense

Cost Accountant - Reynolds & Reynolds, Dayton, Ohio, November 1996 – October 1997

- Participated in due diligence of acquired company and coordinated closing process transition from Sycamore, Ill. headquarters to Dayton office
- Compiled and analyzed monthly financial statements for 3 plants
- Constructed annual business plans for 3 plants
- Conducted and reconciled annual physical inventories for 3 plants

Plant Accountant – Green Tokai Co., Ltd., Brookville, Ohio, March 1994 – November 1996

- Prepared and analyzed monthly business unit financial statements
- Maintained the bill of materials and routings for all manufactured parts.
- Calculated and reported domestic and foreign content for all manufactured parts.
- Constructed annual budget for the business units.

Accounting Supervisor – MilMar Century Corporation, Troy, Ohio, July 1993 – March 1994

- Prepared monthly financial statements.
- Managed cash flow, accounts receivable, accounts payable, and payroll .

- Co-designed and implemented formal cost accounting system.
- Analyzed, documented, and made changes to the accounting system to facilitate work on government contracts

Accountant – *Montgomery County Dept. of Human Services, Dayton, Ohio, Oct. 1992 – July 1993*

Accountant – *Dayton Evans Motor Truck, Dayton, Ohio, March 1992 – October 1992*

EDUCATION

University of Dayton – Dayton, Ohio

- Master of Business Administration – December 1991, Summa Cum Laude
- Bachelor of Science in Business Administration – April 1990

CERTIFICATION

Certified Management Accountant - Certificate #022397

Certified Public Accountant - State of Ohio – License #40986