

DAVID R. HARRISON, CPA, CFP

Arlington, VA • 703.555.1287 • david.harrison@email.com

CHIEF FINANCIAL OFFICER | ENTERPRISE FINANCE & STRATEGIC OPERATIONS MILITARY VETERAN

Financial executive experienced in publicly traded manufacturing and multi-site healthcare operations. Proven record eliminating material weaknesses, strengthening SOX compliance, accelerating audit cycles, and advising senior leadership on capital strategy and enterprise risk.

CAREER HIGHLIGHTS

- **Strategic Financial Leadership:** Enhanced **reporting efficiencies** across **3 divisions** for public manufacturing company by **reducing audit cycle time**, **eliminating material weaknesses**, and **implementing multi-entity consolidation tools**. **Strengthening SOX compliance**, eliminating reported material weakness in SEC filings.
- **Wealth Optimization:** Spearheaded **innovative estate planning** initiatives for multi-family offices that generated **\$8M in client tax savings** by architecting sophisticated trust structures and tax-efficient wealth transfer strategies.
- **Budget Management:** Administered **\$16M** healthcare budget and optimized **\$10M** medical supply inventory and **\$3.6M** pharmaceutical procurement program for military healthcare facilities.
- **Leadership & Team Development:** **Mentored junior finance professionals, colleagues, and 3rd party consultants**, resulting in enhanced operational efficiencies and improved accounting and tax services.

PROFESSIONAL EXPERIENCE

PROFESSIONAL DEVELOPMENT

12/2024 - Present

Achieving continuing education hours required for sustaining CPE Certification.

SUMMIT INDUSTRIAL TECHNOLOGIES, INC. | Arlington, VA

2023 - 2024

CHIEF FINANCIAL OFFICER (CFO) | CONTROLLER

Directed finance for \$3.5M+ revenue division within publicly traded entity, overseeing SEC reporting, SOX compliance, and multi-entity consolidation.

- € **Eliminated material weaknesses in SEC filings** through internal control redesign and strengthened SOX documentation.
- € **Reduced audit cycle by 20%** by streamlining consolidation across three operating entities.
- € Implemented GAAP-compliant revenue recognition standards, mitigating restatement risk exposure.
- € Improved month-end close timeline by 5 days through reporting workflow redesign.
- € Partnered with lenders and investment brokers to support capital planning and liquidity strategy.

STERLING RIDGE PRIVATE CAPITAL | Bethesda, MD

2016 - 2023

SENIOR TAX STRATEGIST & WEALTH ADVISOR

Oversaw tax strategy and multi-state compliance for 50+ entities managing \$100M+ in aggregate assets, structuring advanced estate and wealth transfer strategies to optimize long-term capital preservation.

- € **Delivered \$8M+ in estate tax savings** by designing complex trust architectures, optimizing wealth transfer strategies, and aligning estate planning structures with multi-generational financial objectives.
- € **Developed and presented tailored estate planning strategies** that optimized generational wealth transfers and charitable giving while aligning financial plans with client objectives.
- € **Saved approximately \$8M in estate tax savings for client and ensured full regulatory compliance** through identification of tax planning opportunities and trust structuring.
- € **Standardized tax review procedures and quality control measures**, leveraging Enterprise Resource Planning (ERP) systems and Excel to streamline audit preparation and compliance.

- € **Ensured timely and accurate completion of HNW client and foundation tax returns**, providing mentorship and training to junior professionals and colleagues, and supervising third-party seasonal tax preparers.
- € **Enabled new business development** by participating on client sales calls and onboarding new clients.

FORMER WORK EXPERIENCE

UNITED STATES NAVY

SENIOR FINANCIAL OPERATIONS & HEALTHCARE LOGISTICS LEADER | CAMP LEJEUNE, NC

Oversaw \$50M+ annual operating budget across multi-site healthcare facilities supporting 200+ personnel and global deployments.

- € **Managed \$15M medical supply chain and \$6M pharmaceutical procurement portfolio** ensuring zero operational disruption.
- € **Ensured inventory levels were replenished for deployments**, tracking **\$3.6M** pharmaceutical budget and **\$10M** field medical supply inventory.
- € **Analyzed and prepared accurate supply purchasing vouchers** for contracts valued at **\$11M** annually.
- € **Onboarded new staff efficiently**, enabling new hires to learn accounting and military travel order processes.

ANDERSON CALDWELL & PIERCE, LLP | Gaithersburg, MD

STAFF ACCOUNTANT

Supported audit and tax engagements for multi-state corporate clients with revenues up to \$25M.

- € **Ensured timely submissions and full compliance with federal and state requirements** while preparing corporate, partnership, and individual tax returns, including multi-state filings.
- € **Improved reporting accuracy** by assisting in tax research, reconciliations, and financial statement preparation.

EDUCATION AND CERTIFICATIONS

Master of Business Administration | Emphasis in Accounting | University of Maryland, College Park

Bachelor of Business Administration | Accounting Major | University of Maryland, College Park

Certified Public Accountant (CPA)

Certified Financial Planner (CFP)

SOFTWARE PROFICIENCIES

Proficient Microsoft Office Suite (Word, Advanced Excel, PowerPoint)

CRM Systems; ProSystem fx® Tax; BNA; Income; Estate and Gift Tax Planner; QuickBooks Money Advisor