

## **David E. James, CPA**

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### **SUMMARY**

CEO/CFO Executive, CPA, Entrepreneur, Consultant & Visionary Leader. Creative, resourceful and knowledgeable partner/adviser to entrepreneurs, start-ups, turnaround and established companies of all sizes. Non-traditional CPA. Known for communication, integrity, creativity, dedication, writing, speaking and presentation ability. Extensive technology, software, internet, service and manufacturing (across numerous industries) knowledge and personal financial planning & tax specialist. Expertise in M&A, dental, medical, technology, banking, real estate, insurance, financial services, construction, chemical, lighting, promotional products, engineering, non-profit, ministry, church and music markets. SEC & Big 4 public accounting experience.

### **PROFESSIONAL EXPERIENCE**

#### **Founder/CEO**

**KingdomRock Financial Services, LLC**

1997 – Present (16 years)

Granville, OH

Provides CFO/Consulting services to Entrepreneurs & Companies; CPA & tax planning & tax return services to Individuals.

- Creative, outside the box solutions to improving profitability, financial management, cash flow, business development and implementing the strategy across the organization while saving time, increasing revenues and profits, cutting expenses, avoiding pitfalls and reducing risk – all while improving quality of life.
- Recognized as being a “non-typical CPA” and for communication, integrity, creativity, dedication, as well as writing, speaking and presentation ability.
- CFO and strategic planning/consulting services on temporary, interim, project or on-going advisor basis.
- Comprehensive manufacturing, service and software industry expertise, including specialization in start-up operations, M&A, strategic planning, management and staff development.
- A proven, highly-creative strategic business leader with strong finance, operational, GAAP, Contract review, tax, planning, forecasting, audit and internal control skills with emphasis on integration, team building and partnering across the Organization.
- Vision & Strategic Planning, Operational Planning/Forecasts/Budgets/Financial Models, Sales & Marketing integration with Finance & Operations, Cash Management, Internal Controls, Risk Management, Joint Ventures & Strategic Business Partnerships, Cost Review/Reduction/Containment, Sales Force Efficiency, Product Line/Margin Analysis, Operations Review, Profit Optimization, Reorganization & Turnaround Management. Business Integration, Mergers, Acquisitions & Divestitures, Angel & Venture Capital, Financial Statement Preparation & Analysis, Controller Services, Due Diligence, Litigation Support, Transaction services, • Lease Negotiations/Agreement, Forensic investigations, Software Development management, Contract Negotiation, Organizational and team development, Public speaking, Training, Internet/Social Media strategy & implementation, HR, Tax
- Expertise in M&A, dental, medical, technology, manufacturing, lending, real estate, insurance, construction, chemical, lighting, promotional products, engineering, non-profit, ministry, church and music markets.
- SEC & Big 4 public accounting experience.
- Experience with LEAN and Six Sigma techniques.
- Individuals: Individual/family strategic planning, budgeting, troubled budget workouts, tax return planning & preparation; job loss counseling.

## **President & CEO**

REALscore LLC (www.REALscore.com)

2010 – Present

Granville, OH

Responsible for all aspects of Company development since inception, including funding and site development.

Summary: Fact: "Location" is the #1 key to Dental Practice financial success. But REALscore's definition of "Location" isn't just the physical location of the office. It's much, much more.

When we talk about "Location", we're including these crucial, strategic aspects: Demographics; Location Analytics; Competition/Market Saturation; Future Growth Potential; Building Strategy (do I own or lease, remodel or move, add office, etc.); Existing Patient Demographics & Drive Time; New Patients - where are they?; Practice Evaluation/Valuation; Physical Building/Access Properties; Operations; Lending/Refinancing; and more.

REALscore combines world class technology and difficult-to-obtain data to provide cutting-edge Reports, Services, Maps and Data to Dentists and the Companies that serve them, transforming the process of making difficult but critical strategic, operational, acquisition, startup, lending, building, marketing and other business decisions critical to maximizing revenue, building value, streamlining operations and minimizing risk.

REALscore now has a Demographic Report available to any Industry, not just Dental.

Our Purpose is to not only help Dentists of all ages and specialties achieve success, but to have a direct and significant impact on those companies that provide products, services and advice to them. In so doing, it is our desire to serve and help ensure that all families and communities across the U.S., especially those in underserved areas, have full access to quality dental care, provided by Dentists and dental professionals who are thriving and successful.

As the Dentists succeed, so goes the industry.

## **Vice President, Finance**

Acuity Brands, Inc. / Acuity Brands Technology Services,

(\$2B public lighting manufacturer with corporate Headquarters in Atlanta)

2007 to 2009

Granville, OH

- Initial CFO/Major Leadership role in start-up wireless technology software/service company with operations in two divisions:
  - ROAM (Remote Operations Asset Management), involving utilizing wireless technology to monitor and control street lights
  - SAERIS, which provides building relight and renovation services
- Served as Interim GM, led Acquisition Team to buy & integrate third party NOC, Developed Contracts, Implemented MS Dynamics system, led strategic planning.
- Prior to ABTS formation, led business case/ROI model development and analysis for both ABTS divisions, legal structure, identification, analysis and communication of key accounting and other operational issues,
- Led development of 5-year Plan & made presentation to top executives, including CEO and Board; secured initial project funding.
- For Holophane (another division), led new building business case, ROI analysis and lease and other contract reviews.

## **Founder and President**

### Living Rock Family Outreach, Inc

1999 – Present

Granville, OH

- Founded international 501(c)(3) non-profit ministry focused on children and families.
- With family, created **Wendy & the James Gang**. Grew from inception into a recognized, innovative, industry-leading children and family evangelistic ministries. Performed over 700 shows with family across the USA and in South Africa. 1999-2007.
- Developed wide range of strategic, leadership, selling, negotiation, relational and Board development skills while managing all the operational, employee, fundraising, equipment and transportation aspects of the ministry.

## **Vice President - Finance and Chief Financial Officer**

### Pathlore Software, Inc.

1996-1999

Columbus, OH

- Division was purchased by four managers from Computer Associates. Produced mainframe and PC-based Learning and Business Performance Improvement software as well as offered related consulting services to write, train and implement customer applications.
- Joined Company a month after deal closed; owners only had a checkbook but needed to immediately bill over 2,500 customers in the USA and Europe for monthly mainframe software maintenance.
- Successfully built and established from scratch all strategic planning, financial, accounting, human resource, licensing terms, contracts, revenue recognition, planning/forecasting, risk management, building space, operational and internal control functions and was instrumental in executive training, services, sales, marketing and distribution channel development. Developed HR and Finance Department from scratch. Oversaw development of International Operations in Spain and UK.
- Profitably grew to \$10 million in revenue and 60 employees in the first year.

## **Corporate Controller**

### MPW Industrial Services, Inc.

1995-1996

Hebron, OH

- \$80 million provider of industrial cleaning and environmental services with over 1,200 employees. Included six business units, seventy cost centers and six other affiliated companies.
- Condensed a fifteen month project into six months that included totally restructuring all external and internal financial reporting packages and chart of accounts, monthly reviews, internal controls, implementation of JD Edwards mainframe software package, treasury and cash management functions, renegotiation of loan package and renegotiating a new group medical plan that improved benefits for employees and avoided a 43% cost increase.
- Improvements were recognized by the Board of Directors.
- Managed staff of over 30 professionals; reversed a major decline in morale and training and built a team that reestablished credibility with internal and external customers.
- Actively involved in several M&A projects and start-up of a Container Cleaning facility.

## **Corporate Controller**

### Huntington Laboratories, Inc. (now EcoLab)

1991-1995

Huntington, IN

- Privately-held \$100 million manufacturer of 500 sku product line of specialty chemical products, including soaps and other cleaning products, surgical scrubs and wood floor polishes.
- 500 employees at three manufacturing facilities (including Canada) plus 200 person national sales force.

- Joined the Company immediately after founding family sold it to two LBO investment groups. Handled highly leveraged complex transaction and purchase accounting issues. Guided President, CFO and Executive Staff regarding such and other operational issues and directly managed senior & subordinated debt relationships, complex stock issues and highly restrictive loan covenants.
- Company was only one year into a PC-based accounting system (kept manual books before) and a 30 day closing process, so built from scratch all aspects of financial reporting, controls, accounting operations, staffing, treasury, inventory management, cost systems, sales representative compensation, budgeting, forecasting and pricing/product line decision process. Reduced closing time to eight days within six months.
- Modernized and improved payroll and HR functions.
- Oversaw several debt restructurings, including suggestions that saved over \$1 million in taxes.
- Documented over \$2 million of direct cost savings that allowed company to hit EBITDA and other loan covenant requirements.
- Eliminated annual book to physical inventory adjustments of \$500k by identifying and correcting over 80 inventory systems, manufacturing and warehouse issues.
- Created collaborative atmosphere where manufacturing, sales, Human Resources, R&D, marketing and business operations looked at Finance as a partner, not an adversary.

### **Audit Manager**

Coopers & Lybrand (now PriceWaterhouseCoopers, part of Big 4)

1984-1991

Fort Wayne, IN

Extensive SEC and private company experience in wide variety of manufacturing, banking, service, real estate, non-profit and governmental industries, including specialist in M&A, due diligence, entrepreneurial, workaround and difficult audit/management situations. Business and Individual tax expertise. Recognized for bringing in new clients and selling additional services early in career.

### **Education**

B.S. in Accounting, B.S. in Business Management and A.A. in Computer Science; Huntington University, 1984. Summa cum laude. CPA since 1987.