

Global Financial, Tax & Sustainability Director | 360° ROI, Strategy & Board Advisor

Trusted C-Suite Advisor: Accelerate triple bottom-line in global business environment | ISJ Board Overseer

CPA, Certified Public Accountant, licensed in the US, with expertise in public practice & industry. PWC NY tax expert. Sought-out advisor of individual international tax returns, research, consulting & compliance. Thought-leader: Co-develop & steward holistic growth strategies. Motivate & lead teams to strategically add value. Nominated as Board of Trustees Overseer. Cross-leverage experience in Internal Audit & Senior Faculty. Board advisor for successful not-for-profit entities.

QUALIFICATIONS & HONORS

CPA (Certified Public Accountant) licensed in USA	1993
• Licensed & Fellow NJSCPA, New Jersey, USA	Since 2000
• Member AICPA, USA	Since 1999
• Licensed Virginia, USA	Since 1995
Bachelors Program, <i>Accounting</i> Rider University , Lawrenceville, NJ, USA	1992
BBA (Honors) <i>Marketing</i> IBA (Institute of Business Administration)	1991

PROFESSIONAL ACCOMPLISHMENTS – GLOBAL STRATEGIC ADVISORY, TAX & ACCOUNTING

BSG New Jersey, USA & Jeddah, KSA **2013 to Current**

Strategy & Board Advisor | Sustainability, Tax & Financial Director | Social Enterprise, Zakah & Waqf Advisory

Advise Directors on financial and overall strategy for client portfolio – organizational and HNIs

- Bridge robust financial ROIs with triple bottom line impacts – 3P's: People, Planet, Profit
- Partner with Board members to measure cross-sectional performance excellence
- Advisor on organization missions, global projects, grassroots initiatives
- Thought Leader: partner on organizational 360° impact evaluations; assess vision & values alignment
- Measure governance & operational alignment with founding goals
- Co-build secure, integrated platforms with granular permissions to secure confidentiality & controls
- Query and mine data sets to discover patterns and ensure compliance
- Focus on compliance with Zakah requirements, distribution and needs-assessment
- Collaborate with Sustainability, CSR Partner for Family Business Board, Structuring & to build strategic succession plans

Snare Foti LLP, (Certified Public Accountants & Business Advisors) New Jersey, USA **2007 to 2013**

Senior Tax Consultant

- Partnered directly with firm's owner-partner in all areas for high-visibility clients
- Supported clients' business growth by providing practical guidance on tax-related matters
- Led federal, state and local tax returns' preparation for a diverse practice to maximize tax savings
- Completed individual, single-member LLC, partnership income tax returns aligned with latest tax law
- Successfully deliver & advised on tax calculations for quarterly Group Financial Outlooks, Cash Forecasts, Long-Term Plans
- Leveraged research on complex tax issues to benefit clients' personal and corporate income and taxes
- Analyzed tax scenarios and advise on strategic projections to protect income streams
- Compiled annual accounting records and books for tax clients

CohnReznick LLP (Advisory.Assurance.Tax) New Jersey, USA **1998 to 2005**

Tax Consultant

In addition to all responsibilities above, as Senior Tax Consultant for Snare Foti LLP:

- Recognized as one of firm's top-performers, partnered directly with firm's tax, audit & managing partners
- Prepared S-Corp, C-Corp, partnership, trust & not-for-profit federal & state tax returns
- Prepared preliminary compilations & reviews for small businesses to benefit their profitability
- Performed external audits with the audit team

PriceWaterhouseCoopers New York, NY, USA **1995 to 1996**

International Assignment Tax Associate

- Analyzed tax filing positions for HNI American expats & foreign nationals in the US to minimize tax liability
- Prepared federal & state income tax returns for US expatriate clients living abroad & foreign nationals
- Successfully delivered tax calculations & tax projections resulting in significant client savings
- Researched revenue authority tax examinations to secure complex tax savings

PriceWaterhouseCoopers New York, NY, USA (continued) 1995 to 1996**International Assignment Tax Associate**

- Responded to IRS & State tax authority notices on behalf of clients to settle tax investigations
- Consulted with multinational corporations & their assignees on tax issues of their international assignments
- Utilized multinational corporate compensation breakdown to prepare tax balancing calculations
- Coordinated various worldwide issues for global clients
- Researched & analyzed tax treaties & totalization agreements with various countries to determine best tax feasibility

TCI, New York, NY & Envirogen NJ USA 1994**Assistant Accountant**

- Prepared monthly bank reconciliations & performed monthly closing & adjusting entries
- Assisted Controller with preparation of monthly financial statements, billing & payables
- Managed check run, various line items of financial statements & weekly labor utilization & payroll reports

PROFESSIONAL ACCOMPLISHMENTS – EDUCATIONAL**Youth Coaching & Mentoring Jeddah, KSA 2019 to Current****CPA Exam Prep & Accounting Coach**

- Coach aspiring CPA exam students on successful passing of the exam
- Prepare objectives and outlines for courses of study following course review guidelines
- Teach high school students accounting & prepare them for global standardized tests
- Train and encourage long-term commitment for achievement of goals

MSF Lead Instructor

- Walk young women and girls through faith-based learning journey – both virtually and in-person
- Provide instruction through interactive lectures, discussions, PowerPoint presentations, live and virtual
- Communicate and collaborate with other leaders to measure expectations
- Advise on mission, global projects and grassroots programs
- Work with integrated platforms to ensure seamless dissemination of learning and information

DAFGS (Dar Al Fikr Girls School), AdvancED NCA CASI Accredited, Jeddah, KSA 2015**Financial Planning Instructor**

- Modeled high expectations for students as instructional leader and implemented results-focused curricula/programs
- Developed dynamic curriculum maps, scope and sequence documents, daily lesson plans, assignments & testing materials
- Guided students in organizing and writing research findings, bibliographies and final reports
- Leveraged technology to enhance learning, research, prepare projects, including PowerPoint and educational websites
- Implemented diverse classroom management techniques for maintaining student engagement, involvement and discipline
- Partnered with parents in students' success; provided feedback on progress & discussed improvement areas & strengths

NUI Private College-Preparatory School, (NJ AIS Accredited), New Jersey, USA 2005 to 2013**Senior Faculty Member | Financial Planning Instructor**

In addition to all responsibilities above, as Financial Planning Instructor for Dar Al Fikr Girls School:

- Selected among 5% of faculty to partner with Senior Executive Committee to develop school curricula, policies, programs & initiatives to meet accreditation requirements spanning two years
- Collaborated on a school-wide endeavor to redevelop and renew the School Vision and Mission
- Selected as Member of continuing Accreditation Committee for bi-annual reevaluation of the NJAIS (New Jersey Association of Independent Schools) Accreditation

International Business Practice Firm (IBPF) Instructor & CEO of the Virtual Firm

Introduced revolutionary university-level teaching methodology. Students managed virtual company structured on basic organizational model with four main departments: Accounting, Marketing/Sales, Purchasing & Human Resources

- Ensured smooth closing & reopening of the business each year
- Maintained affiliation with course administrators CSBS (Center for Simulated Business Services) at the local university

NUI Private College-Preparatory School, NJ, USA (continued)

2005 to 2013

International Business Practice Firm (IBPF) Instructor & CEO of the Virtual Firm

- Supervised student-employee business interactions with 73+ firms locally & 7,500+ international firms in 42 countries
- Guided students in presenting at the *Annual Practice Firm Connections* Program at the Conference Center at Mercer with over 250 local & international participants
- Evaluated each student-employee's annual performance based on individual *Performance Portfolios*

Girl Scouts Troop Treasurer & Co-Leader

- Managed finances & prepared annual financial records for the troop to present to the Girl Scouts Council
- Co-led weekly meetings to engage young girls with positive role models & inculcate spirit of service
- Chaperoned on myriad of day & overnight field trips locally & inter-state

Boy Scouts Personal Management Merit Badge Counselor

- Prepared boy scouts annually for successful completion of this extensive Eagle Required merit badge
- Supervised, counseled & evaluated each scout on concepts & work done
- Led group of scouts at the annual Merit Badge Fair with over 450 participants

The Lawrenceville School, an NJAIS Accredited, Private 9-12, Preparatory High School, New Jersey, USA

2003 to 2011

Guest Speaker

- Addressed multiple-aged students on current & special interest social, business, faith & community topics
- Utilized multi-media presentation techniques for enhanced learning, retention & engagement
- Partnered with faculty members on multiple community initiatives

ISCJ (Faith-Based Community Services & School), New Jersey, USA

2008 to 2013

Board of Overseers Member

- Oversaw monthly meetings of Board of Trustees & ensured compliance with the Society's Constitution
- Organized & executed annual general body elections

Internal Audit Committee Member

- Provided audit advice on complex organizational & change initiatives to promote enhanced performance
- Studied & evaluated internal controls with recommendations for improvement
- Developed & enhanced audit programs to address & mitigate relevant risks
- Provided expertise in design & implementation of programs, policies & initiatives
- Ascertained reliability of information systems, adequate controls & compliance
- Led evaluation of internal audit data to synthesize & present irregularities & gap analysis
- Presented at Board & Committee meetings
- Reviewed strategic procedural manuals & relevant contracts

AWARDS & RECOGNITIONS | SKILLS

- **Certified Public Accountant (CPA):** *Passed all parts of the Uniform CPA exam, in the US, in first attempt*
- Recognized by the Director of CSBS as one of the **Best Virtual Firms**
- Irving Kern **Memorial Award**, Competition: *"The Accountant as Business Advisor – Expanding Professional Expectations"*
- Dean's List, Rider University, US
- Experienced in all major software, such as, MS Office, Google Workspace, Zoom Meetings & Reports; Tax programs such as, CCH ProSystem fx Tax, GoSystem Tax RS, Intuit Lacerte Tax & TurboTax, Quickbooks, Quicken

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PERSONAL

Citizenship: USA |

Global Citizen: Travelled and lived in 21+ countries |

Native English, Basic Arabic