



Ryan J. Koretoff, MBA, CPA

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Summary

Experienced finance, accounting, and business operations professional. Capable of presenting complex financial information, enhancing internal controls, and executing internal audits. Comfortable working within large information systems. Provides a unique combination of technological vision and business intelligence. Refined communication, project management, and interpersonal skills.

Career Experience

Director, Finance & Operations – Doctor Evidence, LLC, Santa Monica, CA 2015 – 2019

Doctor Evidence is a market leader in AI-enabled medical insights with its SaaS platform that empowers global stakeholders in the healthcare ecosystem to generate actionable data insights. As Director, Finance & Operations, responsibilities encompassed supporting C-Suite strategic initiatives, progressing internal control over financial reporting, and expanding enterprise-wide data analysis practices.

- Improved processes, internal controls, and reporting to help increase EBIT by over 400% (2016 – 2018).
- Led custom ERP system development, centralizing data management, streamlining financial reporting processes, and positioning company for scalable operations.
- Developed Excel resources and trained accounting staff to validate and reconcile month-end close procedures.
- Built vital business and financial models to extract and organize ERP system data used for budgeting, forecasts, financial reporting, and supporting company valuation for sell-side M&A negotiations.
- Produced the organization's first cost accounting model that delivered interactive ROI analysis, gross margin reconciliation, and proprietary internal-use software capitalization (ASC 350-40).
- Collaborated with business development team to create sales and revenue forecasting model consistent with contract revenue recognition standards (ASC 606).

Corporate Controller – National Link, Inc., Glendora, CA 2013 – 2015

National Link is the largest independent ATM company in the Western United States with presence across the nation, Puerto Rico, and the U.S. Virgin Islands. As the company chief accountant supervising over 300,000 monthly transactions, responsibilities included partnering with the President to execute company vision, full-cycle GAAP accounting procedures, budget development and management, internal control advancement, and investment advisement.

- Led strategic M&A analyses with discounted cash flow methodology, to help grow net income by 200% in 2014.
- Introduced legally-binding internally-generated purchase agreements, growing annual ATM sales by over 20%.
- Launched first customer credit limit policies, protecting sales and cutting average collection time by 40%.
- Programmed Excel resources to reconcile monthly processing records, expedite month-end close procedures, and analyze ATM transaction profitability across all affiliated networks.
- Advanced month-end close process and financial reporting with general ledger modifications and use of data imports.
- Trained accounting staff on self-review procedures to improve data entry practices and accuracy.

Controller – Supply Chain Management, LLC, Fontana, CA 2012 – 2013

Supply Chain Management is a business operations consulting firm specializing in the oil, natural gas, steel, and building materials industries. As Controller, responsibilities included front office supervision, full-cycle GAAP accounting functions, union and multi-state payroll processing, budget development and monitoring, internal control enrichment, internal audit execution, and enhancement of strategic relationships.

- Overhauled the general ledger to improve financial statement presentation and GAAP compliance.
- Administered strict budget adherence and improved external business relationships, boosting current ratio by 125%.
- Automated bank reconciliation process with custom Excel model that merged bank and general ledger data exports.
- Created Excel resource to manage 12,000-gallon analog fuel tank and oil futures, increasing gross margin by 25%.
- Delivered and documented internal control procedures, accelerating month-end close process from 7 to 5 days.

Accounting Manager – Coast to Coast Tax Service, Escondido, CA 2011 – 2011

Coast to Coast Tax Service is a high-volume public accounting firm that provides its nation-wide clients with a broad array of accounting and financial services. As Accounting Manager, responsibilities included efficiently servicing the annual, monthly, and ad hoc needs of the clients, leading business development efforts, managing staff and stakeholders, and maintaining the company's accounting records.

Accountant – Financial Advocates, LLP, Costa Mesa, CA 2009 – 2010

Financial Advocates is a public accounting firm established by a former KPMG Managing Director to deliver Big 5 accounting and finance solutions to closely held entities and individuals. As a staff accountant, responsibilities encompassed client financial statement preparation and maintenance, tax return preparation and processing, client relationship management, and strategic business advisement.

Accountant – Koret Business Park, Paramount, CA 2001 – 2009

Koret Business Park is a real estate leasing, management, and property development firm with a diverse portfolio of wholly-owned real estate investments. As the company accountant, responsibilities included financial statement preparation and maintenance, stakeholder relationship management, and sustaining company regulatory compliance.

Other Experience

Owner – Financial Excel, Santa Monica, CA 2015 – Present

Financial Excel is a boutique public accounting and business management advisory firm, established to deliver progressive solutions to complex accounting and finance matters. Broad areas of focus encompass accounting and finance operations, strategy, and transformation for businesses and wealth management, estate planning, and tax strategy for individuals.

Interim Corporate Controller – Ridgeline Telecom, LLC, Brea, CA 2019 – 2020

Ridgeline Telecom is a professional services firm specializing in telecommunication infrastructure expansion. As the interim chief accounting executive, responsibilities included full-cycle GAAP accounting and internal audit procedures, internal control enhancements, relationship building, team mentoring, and executive team financial advisement.

- Implemented new lease and right-of-use asset accounting standards (ASC 842) to accurately reflect financial position.
- Converted financial statements from cash basis to GAAP.
- Audited equity purchase accounting and provided partner tax strategy advisement.
- Digitized department record keeping and documented respective internal control procedures.
- Coached department managers on software subscription renewal negotiations, saving 20% annually.

Education & Certifications

Master of Business Administration (MBA), Finance – Chapman University, Orange, CA

Bachelor of Arts (BA), Psychology – University of Southern California (USC), Los Angeles, CA

Certified Public Accountant (CPA) – Calif. Board of Accountancy; License: 142988; Expiration: Feb. 2022

Passed all CPA exam sections on first attempt with an average score of 89 (top 10% of candidates).