



# JIM O'CONNOR

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## CEO • CFO/Controller • Finance Director • Operations Director

Technically skilled Controller and Manager of Finance and Operations with an orientation toward entrepreneurial situations. Years of experience in financial services, business and software consulting have given me the ability to define and address the needs of both new companies and companies seeking a new direction. I am process and methodology oriented, frequently writing specifications for software developers to automate financial and customer reporting needs. In management my experience includes financial modeling, accounting, cash management, inventory tracking, forecasting, benefits selection and management, and production of tax forms for employees and contractors. Expert Microsoft Office user. *Core competencies include:*

- Accounting Management
- Financial Analysis
- Forecasting
- Cash Management
- Budgeting
- Payroll
- Technology Integration
- Regulatory Compliance
- Efficiency Improvements

## CAREER EXPERIENCE

TRIDENT LAKES CORPORATION, Dallas, TX, Feb.,2016-current

### CEO

Leading the company ([www.tridentlakes.com](http://www.tridentlakes.com)) during start up of operations. Working closely with architects and engineers to develop a unique community of earth-sheltered, concrete condominiums in a resort community. The community is going to be designed for long-term sustainability and survival in any crisis situation. Official ground-breaking planned for October 1, 2017.

MYMOJO CORPORATION, Dallas, TX, Feb.,2014-Feb., 2016

### VP of Operations

On-board part-time as company finishes raising start-up capital. Developed original business plan and mathematical models for company in the daily deal industry. Start-up activities focused on automation of accounting tasks, compliance with Internet privacy laws, and development of virtual currency concepts for website launch.

HERITAGE PACIFIC FINANCIAL, LLC, and related companies, Dallas, TX, Feb.,2009 – Feb., 2016

### CFO/COO/Controller

Established basic operating and financial functions for the company in the launch phase. Instituted basic systems and policies regarding employment offer letters, payroll, paid-time off, benefits, tax payments and reporting, customer receivables, accounts payable, and monthly reporting to investors. Setup **Quickbooks** for multiple companies set up by management, setup direct deposit for payroll, enrolled in EFTPS for tax payments and online reporting for Texas Workforce Commission. Also have basic experience with Microsoft **Great Plains** accounting software.

- Defined and implemented system for tracking customer mortgage payments and assigning correct share to investors by interfacing **SQL Server** database to **Excel**.

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**CAREER EXPERIENCE CONTINUED**

- Manage loan inventory database and assignment to investors, preparing loan sale and servicing documents and sending them to investors for electronic signature.

THOMAS DESIGN & MANAGEMENT CONSULTANTS, LLC, Dallas, TX, 2003 – present

**Managing Member**

- Small business and personal financial consulting
- Business plan and grant development for both for-profit and non-profit entities. Industries include hi-tech manufacturing, specialty hospital, non-profit service and education.
- Wrote paper entitled, “How to Gain Absolute Control Over Rising Health Insurance Premiums”

FEDERAL FINANCIAL GROUP, LLC, Dallas, TX, 2006 – 2009

**Sales Agent**

- Life Insurance sales

EXECUTIVE AGENT GROUP, LLC, Dallas, TX, 2005 – 2006

**Sales Agent**

- Indexed Annuity sales
- Million-dollar per month producer.
- Recognized sales leader.

AON WORKSITE SOLUTIONS, Dallas, TX, 2004 - 2005

**Sales Agent**

- Health Insurance sales

RICHMARK CAPITAL/GREAT COVENANT INSURANCE GROUP, Dallas, TX, 2002-2004

**Stockbroker, Group Health Insurance sales**

- Licenses: Series 7, 63, 22, 24, Group 1 TX, non-resident insurance license in OK and TN.
- Registered representative and general principal

One week after 9/11, I was laid off from my job at Synopsys. Dallas was experiencing a recession in the high-tech sector in 2001. I decided at this time to build on my business training and change my career direction to finance.

SYNOPYS, INC., Dallas, TX, 1992 - 2001

- Sr. Methodology Consultant in the application of software for electronic design automation.
- Consulting clients included NOKIA, SIEMENS, TEXAS INSTRUMENTS, SONY, MOTOROLA, FUJITSU
- Various technical papers published.

TEXAS INSTRUMENTS, INC., Dallas, TX, 1990-1992, 1982-1985

- Sr. Marketing Engineer.
- Design Engineer, various integrated circuit design projects
- Various technical papers published.

ST MICROELECTRONICS, INC., Carrollton, TX, 1985-1990

- Sr. Telecommunications Design Engineer.
- 3 circuit design patents awarded
- Various technical papers published.

## **EDUCATION**

**Masters Business Administration, Accounting & Finance** (1991)  
SOUTHERN METHODIST UNIVERSITY – Dallas, TX

**Masters of Science Electrical Engineering, Telecommunications** (1986)  
SOUTHERN METHODIST UNIVERSITY – Dallas, TX

**Bachelors of Science Electrical Engineering, Accounting & Finance** (1982)  
WASHINGTON UNIVERSITY – St. Louis, MO

## **MISCELLANEOUS**

- Highly fluent in Finnish from student exchange experience and personal study.
- Foreign assignment experience (10 months) in France, 1987. Traveller's knowledge of French.
- Many consulting assignments to Europe and Japan.