



Patricia Schindler, CPA

Consultant

ABOUT PATRICIA

Trish is a highly motivated, detail-oriented professional with 10+ years of diverse accounting, finance, and investment experience acquired through holding senior-level positions with for-profit corporate entities and serving as an advisory board member and treasurer to a nonprofit. She is a diligent, organized leader with a proven record of achieving organizational goals by effectively utilizing her strong project management and team collaboration skills.

After graduating college with the highest *summa cum laude* distinction, Trish began her career as a mutual fund accountant with a Fortune 100 diversified insurance and financial services organization. She advanced to positions of increasing responsibility, including senior mutual fund accountant and senior financial analyst. Subsequently, Trish was a controller and director of institutional marketing with a publicly traded investment management services firm and has provided services to a Fortune 100 worldwide healthcare services and products company.

Trish's responsibilities have included internal and external investment accounting and reporting, account reconciliations, financial statement preparation, intercompany eliminations, regulatory compliance including SEC reporting, and staff training. From business and product development issues to financial analysis and presentations to leadership, she adeptly researches complex topics, performs in-depth profitability, pricing, expense, and variance analyses, documents accounting processes and procedures, develops innovative methodologies, and prepares board reporting packages.

Her merger and acquisition experience includes pre-screening, strategic research, business valuations, due diligence, contract negotiations, and integration activities. Trish is comfortable communicating with and coordinating activities among internal business contacts, board members, consultants, and external stakeholders, including auditors, bankers, and lawyers. She has enterprise financial software experience, including SAP, SAP HANA, Oracle HFM, and BlackLine.

Trish's technical skill set, combined with her ability to foster relationships, adapt quickly, and embrace new tasks, make her an asset on all client engagements.

INDUSTRY EXPERIENCE

Asset Management, Brokerage, Healthcare, Investments/Investment Companies

EDUCATION

- Capital University – Bachelor of Business Administration, Business Management, *summa cum laude*

CERTIFICATIONS

- CPA – Certified Public Accountant – Ohio