

Thomas Brock, CPA, CFA, MBA

Consultant

ABOUT THOMAS

Thomas is a versatile financial professional with 20+ years of corporate finance, accounting and investment experience gained while serving in various leadership roles, including financial analyst, accounting manager, and assistant vice president. In a consulting capacity, he has assisted businesses of all sizes in multiple industries, providing services ranging from bookkeeping and accounting to budgeting and CFO-level planning. Holding the sought-after CPA and CFA credentials, he has also contributed his financial expertise to well-known websites and tutored students via virtual forums.

With public company and private industry experience, Thomas is comfortable collaborating with business leaders on strategic initiatives, corporate governance, and risk management and presenting results and recommendations to executive officers and boards. He capably oversees the accounting and finance activities for multiple companies and subsidiaries and leads distributed workforces to ensure projects are completed promptly and accurately in compliance with internal policies and external laws and regulations.

Thomas is adept at financial planning, reporting and analysis, accounting in accordance with generally accepted accounting principles, intercompany accounting, operational and capital budgeting, financial forecasting and modeling, credit analysis and liquidity management. He is experienced in and has in-depth knowledge of investment strategy, policy and management, as well as mergers and acquisitions, including due diligence reviews and post-deal integrations. His skill set also includes performing strategic research and assessments, preparing key performance indicator dashboards, implementing internal control and workflow improvements, and managing audits and regulatory exams.

During his career, Thomas has overseen the management of a \$4 billion investment portfolio for an insurance group while providing financial expertise and analytic support to corporate finance. He has managed transformational initiatives, including a general ledger conversion, a financial reporting system implementation, and the establishment of a centralized procurement office and cost allocation framework.

An effective communicator who is comfortable working with people at all levels, clients appreciate Thomas' resourceful approach to supporting growth, reducing risk and enhancing profitability for their enterprise.

INDUSTRY EXPERIENCE

Advertising, Asset Management, Employee Benefit Plans, Financial Services, Franchising, Insurance, Investments/Investment Companies, Marketing, Media, Printing, Professional Services, Service, Start-up Companies

EDUCATION

- Franklin University, Master of Business Administration, Financial Leadership
- Bowling Green State University, Bachelor of Science in Business Administration, Finance

CERTIFICATIONS

- CPA – Certified Public Accountant – Ohio
- CFA – Chartered Financial Analyst