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[Click Here For My VBA Programming Site](#)
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SUMMARY OF QUALIFICATIONS

- Expert in Excel, Access, Word, PowerPoint MS Visual Basic for Applications (VBA) and writing Structured Query Language (SQL) extraction procedures in VBA using ActiveX Data Objects (ADO). Working knowledge of HTML.
- Experienced in utilizing the most advanced features of MS VBA to automate, among other things: **(1)** worksheet/document design and data entry, **(2)** data analysis and manipulation, **(3)** data import and export, **(4)** complex database queries, **(5)** cross-application processes, **(6)** error handling, and **(7)** document security. Click on my site link above for greater detail.
- Skilled software developer with extensive experience providing creative software solutions for legal and business professionals.
- Experienced software development and implementation Project Manager.
- Former practicing corporate/securities attorney and CPA with substantial knowledge of securities and corporate law and the financial markets.
- Strong analytical, organizational, written and verbal skills.

WORK EXPERIENCE

9/11-5/12 VBA Developer for Investment Management Business Applications
Northern Trust, Chicago, IL

- Designed sophisticated tax lot reconciliation tool to automate the tedious task of back office investment account reconciliation work. Designed tool to import data contained in PDF files to Excel worksheets and format the results to look identical to the source PDF files. Design additional Excel/VBA/SQL tools to assist in the completion of various other investment management back and middle office tasks.

4/11-11/11 VBA Developer for Various Accounting Applications
TTX Company, Chicago, IL

- Redesigned/enhanced Excel VBA/SQL applications for leading railcar company for accounting for (1) month-end cost accounting reporting, (2) invoice tracking, (3) invoice payment management and (4) receivables aging.

8/11-11/11 VBA Developer for Database Management & Reporting Application
Topco Associates LLC, Skokie, IL

- Developed a database management and reporting tool for managing the progress of new product label design work. Develop additional tools as needed to assist in this project management task.

8/11-11/11 VBA Developer for Management Planning Application
Northwestern Mutual, Milwaukee, WI

- Designed a VBA programming tool for management goals planning, data collection and aggregation.

5/10-9/11 VBA Developer for Commercial Planning Analysis Applications
MillerCoors, Chicago, IL

- Redesigned/enhanced multiple Excel/VBA applications for performing sophisticated commercial planning/market investment analysis for consumer goods company.
- Designed a sales promotions data collection and aggregation tool.
- Designed Excel/Access VBA/SQL product distribution/assortment management tool.
- Designed Excel VBA/SQL product swap decision-making tool.

8/10-9/11 VBA Developer for Rebate Accounting Applications
United Stationers, Inc., Deerfield, IL

- Designed Excel/Access VBA/SQL applications for Fortune 500 business products company for accounting for (1) vendor allowances, (2) sales force commissions, (3) customer rebates and (4) product rebates.

2/10-4/10 VBA Developer for Economic Damages Analysis Application
Smith Economics Group, Ltd., Chicago, IL

- Designed Excel/VBA application for performing sophisticated economic analysis for injured/deceased loss projections.

10/09-2/10 Project Mgr./Programmer for Customized VBA Financial Applications
Titus, Chicago, IL

- Performed work process analysis and designed Excel/VBA applications to automate complex financial reporting requirements, including applications handling **(1)** an Intercompany Service Cost Sharing Model, **(2)** APB 11 Calculations and **(3)** Tax Reconciliations.

6/07-4/08 Project Manager for Testing, Training and Implementation of Major Upgrade to Accounting Software Package for \$1.5B+ Company and Business Analyst/Software Developer for Design and Development of Excel and Access-Based Automation Software for Financial Reporting
Wheels, Inc., Des Plaines, IL

- Performed systems analysis and designed Excel-based applications to automate numerous financial reporting requirements. Also, performed comprehensive review of all existing database reporting tools to identify, document and streamline the future use of such tools.
- Serving as Project Manager for the Finance Department, worked with the controller and accounting, IT and QA staff to manage the very successful implementation of a major upgrade of the existing accounting software used by the client company. Tasks included:
 - Developing work plans, test cases and schedules for testing, training and implementing the new accounting software;
 - Working with users and stakeholders to document business requirements and create a timeline and implementation cycle;
 - Planning, organizing and leading weekly project status meetings;
 - Organizing training materials and scheduling training sessions taught by the vendor software company's representative;

10/06-2/07 Business Analyst/Project Manager for Design and Development of Access-Based Accounting Database Software Programs
Harris Bank/Bank of Montreal, Chicago, IL

- Working with one expert-level Access developer, responsible for the design, development, testing and delivery of a database program to automate accounting processes for parent-subsidary accounting. Served as liaison between end-user financial analysts and primary database programmer. The primary program for this contract imports complex annual and monthly accounting data from Excel spreadsheets, validates and stores the data in an Access database, and generates monthly and other periodic reports for the subsidiary accounting department.
- Also personally designed, developed and wrote all the code for three additional Excel/VBA-based programs that automate the forecasting process for multiple bank division accounting departments.

1/90-12/10 Software Designer/Developer/Sole Proprietor
LegalDoc Software Corporation, Chicago, IL

- Designed, wrote, marketed, sold and continuously supported and maintained **The Blue Sky Filer**. This software automated the state and federal compliance process for securities offerings. The program operated on a platform designed to handle the document assembly requirements for all areas of a legal and/or regulatory compliance practice. It utilized the most advanced features of Microsoft Excel, Word and VBA to create strikingly fast, extremely user-friendly document assembly software applications with minimum programming time and effort.
- **The Blue Sky Filer** has had over 250 clients since its inception in 1990, providing automated legal document preparation for some of the largest law firms in the country, as well as a number of small mutual fund companies, investment advisors, real estate developers, oil & gas developers and commodity pool operators.
- Developed and wrote **The Automated Corporate Minute Book**, which generated all of the organizational documents necessary for Delaware, Illinois and Iowa corporations. This software automated the process of preparing all commonly used state forms, as well as all forms of corporate minutes.

1985-90 Attorney, Corporate and Securities Law

Much Shelist Freed Denenberg Ament & Eiger, P.C., Chicago, IL (1988-90)
Gottlieb and Schwartz, Chicago, IL (1987-88)
Chamberlain, Hrdlicka, White, Johnson & Williams, Houston, TX (1985-87)

- Represented various startup companies in raising initial capital through the private or public sale of securities. Issuers included real estate, oil & gas and commodity pool companies.
- Drafted numerous agreements and other documents in connection with a wide variety of general corporate transactions.

1984-85 Attorney, Tax Law, Touche Ross & Company, Dallas, TX

- Researched tax law issues and processed annual tax returns.

EDUCATION

University of Texas School of Law, J.D., 1984

Publication: Lipsman, *Exemptions Under the Texas Securities Act: A Logical Framework For the Practicing Attorney*, 22 Hous. L. Rev. 725 (1985)

University of Iowa, B.B.A., High Distinction, 1981

Major: Accounting; Concentrations: Calculus, Economics and Finance

PROFESSIONAL LICENSES

Admitted to Texas and Illinois Bars in 1984 and 1987, respectively.

Received CPA certificate from Texas State Board of Accountancy in 1985.