

Julie R. Lambert, CPA, MBA

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SENIOR FINANCE EXECUTIVE

Finance executive with dynamic management career leading organizations to exceed revenue and profit targets. Combine solid strategic planning and general management skills with robust finance qualifications. Harness technology to implement cost savings and avoidance. Expertise and achievements include:

- Financial & Contract Negotiations
- Team Building & Staff Leadership
- Budgeting & Cash Flow Optimization
- Cost Reduction & Avoidance
- Human Resource Administration
- Information Systems & Technologies
- Process Redesign & Change Management
- Productivity & Efficiency Improvement
- Property Business Transactions
- Project Financing

PROFESSIONAL EXPERIENCE

BEACON CREDIT UNION, Dover, Delaware
Vice President of Finance

2010 to Present

Oversee accounting for non-profit organization with \$3M+ annual revenue, \$38M assets, and 25+ employees. Manage daily investments in excess of \$3M.

- Implemented new processes and procedures and created structure for increased efficiencies:
 - ❖ Decreased timeframe of month-end closing by 7 days through introduction of automation previously unknown to staff. Increased timeliness and accuracy of quarterly filings.
 - ❖ Improved tracking of vendor purchase history and direct payment records.
 - ❖ Implemented new reconciliation techniques for network of ATMs across 25+ grocery and convenience stores.
- Managed financial aspects of merger, prepared financial filings, and incorporated 139 new members into organization.
- Reconciled multiple accounts by addressing several long-standing audit issues.

JEFFERSON'S POPLAR FOREST, Dover, Delaware
Director of Finance and Human Resources

2004 to 2010

Managed accounting practices for non-profit with \$3M+ annual revenue and 41 employees. Led team of 5 FTEs responsible for financial planning and analysis, payroll, human resources, accounting, maintenance, and administration.

- Eliminated ongoing software maintenance fees by outsourcing payroll processing.
- Delivered strong gains in employee benefit programming:
 - ❖ Spearheaded implementation of new 401(k) plan with assets currently >\$1M.
 - ❖ Addressed long-standing tax qualification compliance issue with the retirement program.
 - ❖ Established inaugural supervisor and staff training program and initiated first use of Employee Assistance Program (EAP).
- Drove administrative aspects of Corporation's property development initiatives:
 - ❖ Assisted Executive Director in garnering project support from local government, businesses, and individuals.
 - ❖ Managed 10 rental properties, performing financial analyses and supervising construction jobs.
 - ❖ Helped secure increase in corporation's line of credit for financing property acquisitions.
 - ❖ Negotiated increase in rent revenue over 10-year timeframe with major leaseholder.

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PROFESSIONAL EXPERIENCE (continued)

THOMAS JEFFERSON MEMORIAL FOUNDATION, INC., Ames, Delaware 2002 to 2004
Controller

Supervised staff of 3 to provide accounting and tax support to all department heads in the Foundation. Managed payroll, accounts payable, and accounts receivable processing.

- Directed the Information Technology Manager, helping to lead wide-area network expansion throughout organization.
- Achieved \$10,000 in estimated savings by obtaining 90% employee participation in payroll direct deposit program in first 3 months.
- Improved compliance related to payroll, gifts, scholarship, and fellowship programs through management of tax compliance program.
- Served as primary interface to all financial institutions; ongoing management of liquid assets, pension assets, and endowment assets.

BBT, Dover, Delaware 2000 to 2002
Vice President/Controller

Presented financial performance reports to Board of Directors on monthly basis, identified significant variances and proposed strategy for resolution. Directed Accounting, Operations, HR, Data Processing, Facilities Management, and Compliance Managers to provide exceptional service to customers, employees, and shareholders.

- Attained annual savings in excess of \$15,000 through printing, shipping, and inventory cost controls.
- Oversaw regulatory report preparation for filing with the Office of the Comptroller of the Currency.
- Automated employee reimbursement process while maintaining internal controls.

One Valley Bank, Dover, Delaware 1993 to 2000
Controller

Promoted from Assistant Controller to manage staff of 4. Interacted with all areas of the bank on implementation of new internal and external accounting procedures. Key stakeholder in multiple projects requiring effective management of time and resources.

- Eliminated manual posting and improving timeliness of financial data reporting by converting PC-based financial system to network environment.
- Achieved error-free filings for 8 consecutive months on regulatory reporting.
- Improved efficiency and reliability for teller balance through process redesign.

EDUCATION

Master of Business Administration, Dover College
Bachelor of Arts in Accounting, Dover College
Certified Public Accountant, Dover State Board of Accountancy

AFFILIATIONS & COMMUNITY LEADERSHIP

Capital Accountant, Academy of Fine Arts 2010 to Present
Treasurer, Peakland Swim and Tennis Club, Inc. 2007 to 2010
Member, American Institute of Certified Public Accountants
Past Board Member, Delaware Society of Certified Public Accountants; Government Financial Officers Association; and the Institute of Management Accountants
Past Committee Member, American Heart Association Business Campaign and the United Way Budget Committee