

PEGGY CAROLLO

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Lake Forest, CA

STRATEGIC LEADER: Chief Financial Officer • VP Finance

The Go-To Financial Leader with a Strategic Edge, leading people and designing systems that reduce stress by mapping out a clear path thru uncharted territory. Known for presenting simple, complex and abstract issues in a clear, easy-to-understand manner. Reputation for success in streamlining operations, software integration, increasing profits, safeguarding assets, organizational transparency and achieving strategic goals.

Demonstrated excellence in financial services, business consulting, health and wellness, non-profit, and banking. Leader of highly-regulated organizations ranging in size from 50 to 10,000 employees; \$5 million to \$12 billion in revenues.

Experienced in utilizing Best Practices to develop and execute business strategies in fast-paced environments.

CORE COMPETENCIES

- ▶ Financial Analysis
- ▶ Strategic Planning
- ▶ Regulatory Compliance
- ▶ Operations
- ▶ System Implementation
- ▶ Risk Management
- ▶ Mergers & Acquisitions
- ▶ Great Plains/FRx
- ▶ Budget & Forecast
- ▶ Board Relations
- ▶ Process Improvement
- ▶ Banking

SELECTED CAREER HIGHLIGHTS & ACCOMPLISHMENTS

- Managed FDIC West Coast portfolio of 154 failed-bank receiverships with \$12 billion in assets, improving the number of completed business plans from 22% to 100% in 9 months.
- Initiated systems and controls that turned around nearly insolvent YMCA of Orange County, increasing revenue 220% to \$30 million, total assets 310% to \$20 million and net assets 365% to \$10 million over ten years.
- Functioned as Chief of Staff for Associate Director of FDIC West Coast office, acting as his principal advisor on issues within the West Coast office. Prepared PowerPoint presentations for executive summits in Washington and Dallas.
- Directed the installation of enterprise-wide software for YMCA of Orange County, accelerating field manager's access to financial and operational performance metrics from monthly to daily reporting.
- Key member of YMCA of Orange County executive team guiding the company through strategic reorganization, increasing program participation by 150% and annual revenue by 80% over 5 years.
- Improved interdepartmental collaboration, reducing West Coast portfolio "Expense to Collection" Ratio to 8.82% versus FDIC national average of 9.98%.
- Supervised 45 personnel in Finance, Risk Management, Facility Maintenance, Contracting, HR, and IT for YMCA of Orange County.

PROFESSIONAL EXPERIENCE

- **Chief Financial Officer – Chief Operating Officer**
Canon Strategic Holdings • Laguna Niguel, California 2012
A bank holding company created to acquire national and state chartered banks in California and the Southwest USA.
- **Senior Financial Manager, Receivership Oversight** 2010-2012
Chief of Staff for Associate Director West Coast Office 2009-2010
Federal Deposit Insurance Corporation • Irvine, California
The FDIC is an independent agency created by Congress to oversee and maintain the nation's financial system by insuring bank deposits, examining and supervising banks/financial institutions, and managing receivership resolution responsibilities.
- **Chief Operating Officer**
Sweek Connolly & Company, CPA • Costa Mesa, California 2007 - 2008
CPA firm comprised of 12 tax professionals and staff accountants, specializing in audit and tax, wealth management and estate planning for mid-sized privately-owned businesses.
- **Chief Financial Officer / Executive Vice President**
YMCA of Orange County • Tustin, California 1997- 2007
A \$30 million health and wellness non-profit organization serving 92,000 members. The YMCA operates 11 different lines of business, 4 fitness facilities and 140 program centers across Orange County by engaging the services of 800 employees and 48 volunteers at the Board of Directors level.
- **Vice President - Business Development / Credit Administration**
Southern California Bank • Laguna Hills, California 1994 - 1996
Orange County community bank, with \$1 billion in assets, serving middle-market corporate borrowers, subsequently acquired by US Bank.
- **Director of Finance and Administration**
Webb Automotive Group • Irvine, California 1991 - 1993
Automotive holding company comprised of 8 dealerships and 4 insurance companies, with 625 employees generating \$330 million in annual revenue.

SOFTWARE PROFICIENCY

Great Plains, FRx, Business Objects, SharePoint, Excel (Intermediate), PowerPoint, Word, Visio, CSI, Microsoft Project, Fiserve, PowerPlan.

EDUCATION & PROFESSIONAL DEVELOPMENT

Master of Business Administration - Finance • Michigan State University • East Lansing, Michigan

Bachelor of Business Administration - Finance • Wayne State University • Detroit, Michigan

Vistage • Executive Development Program • Irvine, California