



TRADITIONAL CONSULTING • INNOVATIVE RECRUITMENT

## JESS GUTIERREZ

### Consulting CFO

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(408) 772-7648

#### EXECUTIVE SUMMARY

Consulting CFO who generates positive change by creating and implementing new financial processes and best practices for non-profit organizations. In addition to assessing and fixing broken systems, he finds, trains and mentors talented staff, empowering them through streamlined work processes and optimized organizations. His devotion to non-profits, enabling altruistic organizations to thrive and do their best work to serve their community, is one built through a lifetime practice of personal and professional involvement in a variety of industries.

#### EXPERIENCE

##### **PARTNER, CONSULTING CFO**

2007 to Present

*Specialty consulting CFO and recruiting firm that customizes financial management solutions by utilizing part-and full-time staff through contract employment or direct hire.*

- Leads the Non Profit practice group and co-leads the Financial & Small Business practice groups.

##### **SENIOR VICE PRESIDENT/CFO**

2006 to 2007

San Jose, CA

*\$375 million full service financial institution with over 40,000 members serving Santa Clara, Alameda and San Mateo counties.*

- Oversee the management the financial operations of the credit union, including financial reporting, budgets and forecasting, ALM, and information systems.
- I implemented a strategy to diversify the balance sheet and improve asset yield.
- I spear headed the move to integrate strategic planning, marketing plan and the budget process.

##### **VICE PRESIDENT FINANCE**

2004 to 2006

San Jose, CA

*\$300 million full service financial institution with 32,000 members serving Santa Clara, Alameda, and Contra Costa Counties.*

- Oversee the management the financial operations of the credit union, including financial reporting, budgets and forecasting, ALM, electronic payments services.

##### **CHIEF FINANCIAL OFFICER**

2000 to 2004

Sunnyvale, CA

*Production Stage Company manufacturing components for Tier I fiber optic telecommunications and CATV systems providers.*

- Created the operating infrastructure: including locating our facility, establishing our communications and technology functionality, recruiting strategies, and financial operations.
- Worked with team to implement our Oracle ERP system and was responsible for setting financial policies and procedures consistent with SEC, GAAP and FAS reporting requirements.

##### **SENIOR VICE PRESIDENT AND DIVISION MANAGER**

1998 to 2000

Santa Clara, CA

*Commercial bank which focuses on development stage technology based companies.*

- Managed the investment portfolio and treasury operations for this \$4 billion bank.
- Managed a product division that grew from \$1.1 billion in assets to \$8 billion in assets under management.

##### **FINANCIAL CONSULTING PRACTICE**

1997 to 1998

- Developed financial operating procedures and manuals for a real estate developer.
- Created a global insurance reporting program for sales and distribution operations located in Europe, Asia, North and South America.

##### **VICE PRESIDENT AND ASSISTANT TREASURER**

1986 to 1997

San Jose, CA

- Established the treasury and reinsurance accounting operations in accordance with statutory accounting principles.
- Developed the strategic asset plans to hedge our interest rate risk.

##### **CFOs2GO**

[www.cfos2go.com](http://www.cfos2go.com)

##### **Alliance Credit Union**

##### **Valley Credit Union**

##### **K2 Optronics, Inc.**

##### **Silicon Valley Bank**

##### **DiNapoli Companies, Adobe Systems**

##### **Citation Group of Insurance Companies**



#### PROFESSIONAL ACTIVITIES

- California Society of CPAs
- San Jose Conservation Corp & Charter School, Member of the Board of Directors
- Chairman - Audit Committee
- Children's Musical Theatre of San Jose, (Past) Member of Board of Directors, current member of the Audit Committee

#### AUTHOR AND SPEAKER

<https://www.2gocompanies.com/nonprofit-blog/2017/08/protecting-npo-take-deeper-look-enterprise-risk-management/>

#### EDUCATION

- MBA, Pepperdine
- BS, SCU

Concentrations: Commerce, Finance

#### For more information:

<https://www.2gocompanies.com/cfos2go-partners/jess-gutierrez/>