

**Terrell A. Turner, CPA**  
Charlotte, NC • Phone (803) 528-5202  
E-mail [Terrell@TLTurnergroup.com](mailto:Terrell@TLTurnergroup.com)

---

Experienced finance leader with 13 years of operational and strategic finance and accounting experience with a FinTech company, Big Four accounting firm and multiple fortune 500 companies. Strengths include leadership of teams, developing business partnerships, consulting, continuous process improvements, establishing strong controls and project management of business initiatives across various geographical locations.

### **PROFESSIONAL EXPERIENCE**

#### **TLTurner Group**

**March 2020 – Present**

##### **Senior Partner – (Charlotte, NC)**

- Lead all sales and business development activities that allow the firm to achieve its revenue objectives.
- Establish and overhaul financial reporting packages for internal and external use to ensure the organizational leadership and associated stakeholders for my clients have consistent and clear financial reporting.
- Create financial forecasting models to support business strategies, major transactions and acquisition activities.
- Develop internal accounting policies and internal control procedures for businesses and non-profit organizations.
- Perform pricing and profitability analysis around sales strategies and provide recommendations for enhancements.
- Assist businesses in developing pitch decks for raising capital, customer presentations and other negotiation activities.
- Coach management and staff level team members to effectively and efficiently deliver on client expectations.

#### **Passport Inc.**

**December 2018 – March 2020**

##### **Director – FP&A (Charlotte, NC)**

- Led financial modeling and reporting to support the equity raise of \$65M in new investor funding
- Created financial models to support the acquisition of target companies between \$5M - \$20M in valuation
- Developed the monthly financial reporting packages for the leadership team reviews with the Senior Leadership Team and the Board of Directors
- Led the annual operating plan process including the coordination and consolidation of all cross functional assumptions and inputs.
- Established reporting around critical risk and opportunities for the business to achieve its objectives and key results
- Build out a finance team to support the financial planning and analysis function as well as a commercial finance team

#### **General Electric Inc.**

**May 2018 – December 2018**

##### **Sr. Finance Manager – Global FP&A (Cincinnati, OH)**

- Managed the efforts of a 10 member team and provided financial oversight and analysis of a \$6.5B business unit
- Partnered with senior executives to drive commercial actions to achieve \$120M in incremental profits.
- Analyzed business performance and proposed action plans to improve profitability and cash flow from operations.
- Led the quarterly and annual planning and forecasting process for a \$6.5B business division.
- Led special projects and coordinated efforts with the IT teams to implement a new profit and loss reporting structure.
- Drove simplification and operating rhythms to align the strategies of multiple business divisions.
- Managed the efforts of multiple Center of Excellence (COE) shared services teams across North America, Europe and Asia to effectively plan, forecast and execute quarterly and annual strategies.

#### **General Electric Inc.**

**January 2016 – May 2018**

##### **Sr. Finance Manager – Business Unit (Cincinnati, OH)**

- Finance leader for a \$758M business unit tasked to achieve a 33% year over year growth rate.
- Managed a \$100M capital allocation strategy covering multiple supply chain locations (domestic and international).
- Implemented cash management processes around balance sheet activity to drive an 11% year over year improvement.
- Coordinated the efforts of 400 employees to successfully complete multiple annual product and process reviews.
- Partnered with business leaders to develop operational strategies to drive improvements within the business unit.
- Led quarterly and annual planning and forecasting activities along with presenting regular management reporting.
- Improved the pricing process for new product offerings and enhanced current pricing practices.
- Led implementations of digital solutions to simplify the forecasting activities for multiple manufacturing sites.
- Led the execution of transitioning operations between businesses in North America, South America, Asia and Europe.

**General Electric Inc.****October 2014 – December 2015****Finance Manager – Business Unit (Sterling, VA)**

- Provided financial leadership for a \$65M operation and achieved a 27% YoY growth in sales.
- Supported disaster recovery plans and negotiations with customers after disaster events impacted critical suppliers.
- Redesigned the management reporting process for the supply chain, sales and marketing functions.
- Designed and implemented operational processes to reduce customer complaints concerning service delays.
- Partnered with operational leaders to enhance the planning process that led to a 25% reduction in working capital.
- Assisted in aligning the targets and strategies for various departments to achieve a 20% increase in profit margins.
- Returned the business to a 100% controllership compliance status while reducing the closing cycle by two days
- Led efforts of establishing 6 remote Center of Excellence teams to provide support for global business units.

**Navistar Inc****September 2010 – October 2014****Accounting/Finance Supervisor –North America Dealer Operations (Lisle, IL)**

- Lead the monthly accounting close consolidation process for 10 business units throughout North America.
- Performed due diligence analysis for business unit divestures and business units in held for sales status.

**Finance Leadership Development Program Associate****Sr. Financial Analyst –FP&A (Sao Paulo, Brazil)**

- Analyzed and presented monthly financial performance metrics to senior leadership for a \$4B South American business unit.
- Provided analysis for all cost out and six sigma lean projects for multiple locations in South America.
- Led the forecasting and analysis of engineering expenses for projects in Brazil, Argentina, China and India.

**Financial Analyst – Investor Relations (Lisle, IL)**

- Analyzed internal and external financial data and trends to provide the CEO, CFO and Senior VP staff of a \$15B company with recommendations and talking points for meetings with the Board of Directors, Investor community and Wall Street Analyst.
- Provided analytics on key competitors, customers and overall industry trends to the senior leadership team.
- Led the Transfer Agent Services cost reduction project which yielded a 20% cost savings for the company.

**Financial Analyst – Engineering and Manufacturing (Columbia, SC/Lisle, IL)**

- Led the business case analysis process to support an \$8B business segment for all North America operations.
- Developed cash flow, NPV and sensitivity analysis with recommendations for all engineering and quality projects for vehicles sold and supported in North America.
- Designed and led the implementations of inventory procedures that drove an 18% improvement in inventory accuracy.
- Supervised a team of 65 employees to complete quarterly physical inventories.
- Developed financial models used to support the growth of \$20M in new Business Development projects.

**Audit Program Consultant****Blue Cross Blue Shield - (Columbia, SC)****January 2010 – August 2010**

- Designed audit programs and financial models for assessing and forecasting the financial impact of litigation claims against Blue Cross and Medicare.

**Senior Accounting Auditor****Ernst & Young LLP – (Charlotte, NC)****July 2007 –November 2009**

- Managed teams of auditors to complete regulatory compliance and financial statement audits for clients in multiple industries (Manufacturing, Transportation, Real Estate, IT, and Not-for-Profit/Governmental).
- Analyzed key estimate based accounts for the proper application of GAAP accounting.
- Designed procedures for auditing routine and complex accounting and operational processes.
- Led, developed and coached staff through on the job training to deliver high quality results for our clients and firm.

**EDUCATION/CERTIFICATIONS**

- Masters of Science in Accountancy (2008) - University of Notre Dame - South Bend, IN
- Bachelor of Science in Business Administration (2007) - Lander University Greenwood, SC
- Certified Public Accountant – Licensed in the State of North Carolina (Active)