

Lori L Ivey
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Multitalented and resourceful CFO with an MBA, ACC and MSA in Business Management, 10+ years' experience in executive-level business management, financial accounting and analysis, optimizing accounting processes and internal and external auditing and online teaching skills. Capable of utilizing training tactics, legal knowledge, analyzing business trends and customer relations to foster growth and development. Extensive financial analysis, economics and accounting experience; Data-oriented approach to problem-solving; Good understanding of budgeting process; Ample knowledge of securities and bond markets; and the ability to motivate those in demanding jobs.

Work Experience:

CFO

Deere's Farm & Ranch Services LLC
Athens, Texas
Nov 2024 to June 2025

Developed and implemented financial policy and procedure, developed long-term financial plans; Provided financial advice for marketing, operations divisions; Oversaw annual budgeting process; Created investment strategies and identify growth areas; Conducted periodic risk analyses; Monitored tax liabilities and audits when necessary; Managed internal finance staff and external contracts; and assisted business in meeting regulatory obligations.

Senior Business Analyst

IDS
Colorado Headquarters
May 2015 to Present

Create and manage business plans and strategies using qualifiable and quantifiable strategies to develop efficient operational and managerial processes to increase annual gross margins by 10 to 20%.

Liberty University
Adjunct Professor
School of Business
January 2024- present

Facilitate online accounting course. Primarily responsible for content and competency instruction. Providing substantive feedback on student submissions, accessible to student questions, concerns, and assignments.

Controller

Feduke Motor Company
Morganton North Carolina
March 2014 to May 2015

- Oversaw financial statement preparation (balance sheets, invoices, accounts payable and accounts receivable), data collection procedures, and maintained existing systems and software.
- Directed Accounting department operations, compiling financial reports based on collected data and established policies and procedures.
- Implemented updated policies and procedures for financial reporting.

Senior Accountant

Revention POS
Stafford, Texas
June 2012 to Jan 2014

- Created and analyzed liability, asset, and capital accounts by compiling electronic data and required documentation.
- Summarized and prepared financial status and transactions reports, including a profit and loss statement, and other necessary reports.
- Complied with all federal, state, and local protocols including legal requirements, and interpreted new and existing legislation.
- Created and implemented Standard Operating Procedure (SOP) manual for accounting policy and regulations.
- Monitored and maintained a new audit system by implementing new policies and procedures in the finance department.
- Guided junior accountants and other staff by answering questions and coordinating informational classes.
- Focus on tax compliance, state business registration, contract review, and non-profit tax filing.
- Played a vital part in the company's financial management which includes all account reconciliations and reporting to necessary parties.

Junior Controller

Republic Harley Davidson
Retail Sales and Service Establishment
June 2010 to June 2012

- Working with each department head to optimize cost.
- Analyzing actual divisional results each month to identify operational variances.
- Preparing financial reporting for monthly, quarterly, and yearly review.
- Working with and planning and preparing monthly, quarterly and yearly financial forecasts.

Business Manager

Atlasst Classic Connection

Wharton, Texas

Jan 2002 to June 2010

- Supervise clerical staff and other employees.
- Design work schedules and organize employee training.
- Resolve employee and client issues.
- Ensure the workplace safety and security.
- Work with outside vendors to maintain necessary relationships.
- Maintain a good working relationship with executives and other managers.
- Design and implement policies and procedures to improve profitability.

Core competencies: Accounting principles, A/P, A/R, account reconciliation, analysis, general ledger accounting, business management requirements, auditing, executive level policy and procedure requirements, systems, processes, procedures, accountability monitoring, measuring and management, HR practices, taxing authority requirements, processes and procedures, and business development practices.

Technical Competencies: Word, Excel, Microsoft, STS, Tableau, Quick Books, Quicken, BPI, Power Point, Zoom, Teams, Blackboard, Google Classroom, Click Funnels, ClickMagic, GetResponse, Cloudflare, and NetSuite.

Additional Experience:

Senior Legal Manager

Holoway Jones Law Firm, P.L.L.C.

Legal Business Manager

Dinkins, Kelly, Lenox, Lamb & Walker, LLP

Senior Legal Assistant/Office Manager

House & House, P.C.

Legal Business Manager

Law Offices of Jim Peacock

Adjunct Faculty-Business Department

Wharton Junior College (2013- 2yrs)

Education:

PhD- Organizational Management- August 2013

Capella University

Course work completed- Dissertation still needed to complete degree.

MSA- Business Management

University of Phoenix

2009

MBA/ACC

University of Phoenix

2008

BSB- Business

2005

Assessments

Management & leadership skills: Planning & execution — Proficient

May 2023

Planning and managing resources to accomplish organizational goals. Full results:

Proficient

Management & leadership skills: Impact & influence — Proficient

May 2023

Choosing the most effective strategy to inspire and influence others to meet business objectives. Full results: **Proficient**

Customer service — Proficient

September 2022

Identifying and resolving common customer issues. Full results: **Proficient**

Customer focus & orientation — Proficient

September 2022

Responding to customer situations with sensitivity. Full results: **Proficient**

Supervisory skills: Motivating & assessing employees — Proficient

May 2023

Motivating others to achieve objectives and identifying improvements or corrective actions.

Full results: **Proficient**

General manager (hospitality) — Proficient

May 2023

Solving group scheduling problems and reading and interpreting P&L statements. Full results: **Proficient**

Analyzing data — Proficient

May 2023