

SUSIE SULLIVAN, MBA, CPA, CGMA

CHIEF OPERATIONS OFFICER

October 2022 -- current

BRANSCOMB LAW

Branscomb Law has four law offices in Corpus Christi, San Antonio, Austin, and Houston.

- Responsible for all operations of four offices. Work with the Board of Directors and the Managing Partner. Main responsibilities include:
 - Supervise accounting staff and oversight for:
 - Monthly financial reporting.
 - Setting annual budget & reviewing monthly financials
 - Cash management / Line of Credit
 - GL oversight.
 - Supervise IT function.
 - Oversight of several major migrations
 - Supervise all HR functions:
 - Manage administrative staff (20) / 50 employees total (including attorneys).
 - Health insurance and other benefits including 401K plan management.
 - Contract management.
 - Facilities management.
 - Relationship management with:
 - Bank institutions,
 - Accounting Firm,
 - IT vendors
 - Insurance Providers

DEPUTY CFO

April 2021 – September 2022

CORPUS CHRISTI HOUSING AUTHORITY & AFFILIATES

CCHA&A is a quasi-governmental entity that offers low-income housing at fifteen properties.

- Worked with the CFO to manage the finance function including:
 - Monthly financial reporting to: Department Vice Presidents, CEO, and Board of Commissioners
 - Managing six people in the Finance department (including discipline and evaluations)
 - Assisted CFO in developing annual budget for 15 properties along with 6 other affiliates
 - Coordinated annual audits with auditors and investors
 - Assisted CFO with transitioning the HA to a centralized maintenance function
 - Manage bank reconciliations for 22 bank accounts and helped to maintain banking relationship
 - Worked with procurement department to ensure proper allocations and payments and managing contracts
 - Data Base Administrator for YARDI (software system used by CCHA&A)
 - Monthly VMS reporting to HUD
 - Managed the accounts payable, accounts receivable function along with general ledger oversight

VICE PRESIDENT, CHIEF AUDIT EXECUTIVE (CAE)
BAY, LTD. – CORPUS CHRISTI, TEXAS

September 2005-February 2020

Bay, Ltd. is a multi-disciplined contractor/industrial construction company. Bay provides services to industries in refining, chemical and petrochemical manufacturing, gas processing and transmission, offshore exploration & production, and power generation.

- Assessing risk for all areas of the company and implementing policies & procedures for mitigating those risks in all areas of the company including:
 - Divisional / Departmental / Projects – both lump-sum & T&M
- Helped divisions and departments monitor their budgets
 - Pointing out and addressing variances in budgets
- Managed internal audit staff (including discipline and evaluations)
- Managed the P-card process
- Regularly audit compliance with policies & procedures in 10 divisions and functional departments.
- Develop complex financial analyses of options and alternatives facing the company.
- Special projects included:
 - Assisting the CFO and others on a team to evaluate and implement a new ERP system
 - Help with HR – including assisting with the company policies and procedures
 - Involved/assisted CEO and CFO with potential selling of one division of the company
 - Involved/assisted CEO and CFO with acquiring/purchasing company.

AUDITOR

December 1998-July 2003

FITE & WHEELER, P.C. – CORPUS CHRISTI, TEXAS

Public accounting firm that performs financial statement audits & prepares tax returns.

- Coordinated with clients timing of audits along with staffing requirements.
- Prepared compilations, reviews, and audits.
- Audit clients included: non-profit organizations, construction companies, private member associations, a major beer distributing company, and homeowners' associations.

EDUCATION / PROFESSIONAL MEMBERSHIPS / CERTIFICATIONS

- BBA in Accounting from TAMU-CC 1996
- MBA from TAMU-CC 2008
- Certified Public Accountant in the State of Texas; # 82619. Licensed 2003
- Certification in Risk Management Assurance 2012
- Chartered Global Management Accountant 2012
- Member of TXCPA (Texas Society of CPAs)
- Member of AICPA (American Institute of CPAs)
- Member of ALA (Association of Legal Administrators)

COMMUNITY INVOLVEMENT/VOLUNTEER (current / *past*)

- Board member and Treasurer for YMCA of the Coastal Bend
- Nueces County Appraisal District Board
- Board member (*and past president*) of Corpus Christi Chapter of TXCPAs
- Volunteer at church both music ministry and catechist

- *Adjunct Professor at TAMUCC*
- *Advisory Board for TAMUCC College of Business*
- *Board member and Treasurer of the CCPD Foundation*
- *Board member of Ronald McDonald House of Corpus Christi*
- *Volunteer for Big Brothers Big Sisters*
- *Volunteer for CASA (Court Appointed Special Advocates of the Coastal Bend)*
- *Selected for Inaugural CC Under 40 Recognition (2006)*