
Financial Professional

Financial leader and trail blazer within the academic industry.

Award-winning and versatile leader with a quantifiable history of business development, process improvements, and project oversight. Possessing a successful history that includes impactful publications, public speaking presentations, and higher education instruction. Innovative problem solver with a results-driven approach to tackling problems. Ready for any new challenges the COVID-19 pandemic creates.

Highlights of Expertise

- Organizational Leadership
- Managerial Accounting
- Client Relations
- Regulatory Compliance
- Talent Management
- Revenue Growth
- Business Development
- Financial Analysis
- Process Improvements
- Operational Oversight

Financial & Accounting Experience

Terry & Hulett Consultants (2019 to current)

Siebert Cisneros Shank & Co, Dallas, Texas

Managing Director (2017 to 2019)

Spearheaded the underwriting services for SCS businesses in a north Texas territory with a specialization in public schools. Led business development initiatives and client retention strategies. Cultivated long-lasting relations with clients.

- ◆ Successfully brought in \$200M in bonds business.
- ◆ Passed Series 52 and 63 Licenses examinations.

Dallas ISD (158K enrollment), Dallas, Texas

Chief Financial Officer (2013 to 2017)

Executive Director of Budget & Demographic Services / Director of Budget Services (2011 to 2013)

Helmed the financial and accounting departments for the school district – just under \$2B. This included general ledger, A/P, payroll, treasury, cash management, investments, special revenue funds, budgeting, risk mitigation, inventory, Workers Comp, financial analytics, and reporting. Supported efforts on the operation side of the district including asset management, compliance, and procurement.

- ◆ Trail blazer in improving the way teachers and school administrators are paid.
- ◆ Integral role in bringing the district out of their financial struggles.
- ◆ Reorganized the division which resulted in awards for the District in finance and budgeting.
- ◆ Recognized as “CFO of the Year” in governmental accounting and grew the fund balance by \$300M.
- ◆ Led the District out of E-rate compliance and ensured continual regulatory compliance.

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M.E. Allison Investment Bankers, San Antonio, Texas

Investment Banker, (2011 to 2013)

Worked with School Districts on Bond related issues.

- ◆ Passed Series 7 and 66 License examinations.

North East Independent School District (55K enrollment), San Antonio, TX

Executive Director of Finance & Accounting Services (CFO) (1999 to 2011)

Executive Director of Internal Audit (1994 to 1999)

Direct of Budgets, Investments, & Federal Programs (1989 to 1994)

Assistant Director for Planning & Budget (1987 to 1989)

Led all financial, business, and risk management operations for a \$500M organization. This including accounting, budgeting, payroll, benefits, and grant administration. Oversaw cash and risk management, purchasing, warehousing, eCommerce, and the truck fleet. Interfaced with the Chief Financial advisor and the Superintendent and Associate Superintendents regularly.

- ◆ Brought lean six-sigma to the operations of the district.
- ◆ Managed an investment portfolio of \$1B and brought in \$100K+ in investment income.
- ◆ Established new administration buildings and led all contract financing.

Additional Experience

AVP Budgeting / Managerial Accounting Manager (1981 to 1986) ▪ San Antonio Federal Credit Union, TX

Divisional Controller (1979 to 1981) ▪ Coca Cola of the Southwest, San Antonio, TX

Teaching Experience

McLennan Community College, Waco, Texas

Adjunct Professor (2019 to Present)

- ◆ Managerial Accounting | Introduction to Accounting

Dallas Baptist University, Dallas, Texas

Adjunct Professor (2017)

- ◆ Doctoral Program Educational Finance | Undergraduate Managerial Cost Accounting

St Mary's University, San Antonio, TX

Adjunct Professor (2007 to 2011)

- ◆ Governmental and Non-Profit Accounting | Managerial Accounting | Principles of Accounting | Cost-Accounting

University of Texas, San Antonio, TX

Lecturers (1989 to 1991, 1997 to 1999, 2005 to 2008)

- ◆ Controllership | Performance Management | Cost-Accounting | Government Accounting

University of Texas at Austin, Austin, TX

Assistant Instructor (1987 to 1988)

- ◆ Undergraduate Cost Accounting

Education & Credentials

Post-Doctorate in Finance and Accounting

University of Florida, Hough Graduate School of Business, Gainesville, Florida

Ph.D. in Psychology

Saybrook University, San Francisco, California

Master of Arts in Psychology

Sonoma State University, Rohnert Park, California

Bachelor of Arts in Psychology

Allegheny College, Meadville, Pennsylvania

Professional Development & Certifications

- Academically Qualified by the AACSB
- Post-Doctoral Bridge Program in Finance & Accounting | University of Florida, Gainesville, Florida
- Black Belt Certification | Six Sigma – General Electric Management Program
- CPA – Certified Public Accounting
- Registered Texas School Business Administrator, RTSBA
- Certified Public Funds Investment Manager, CPFIM

Accounting for Governmental Entities & Non-Profit Organizations

Community Service

Past Chair of the TASBO Accounting Committee

Founding Board Member & Treasurer Alamo Area Mediators Association

Past Board Member San Antonio Family Mediators Association

Past Member Texas Association of Mediators

Bexar County Dispute Resolution Center - Trainer and Mediator 1984 -1999

Alamo Area Mediator Association & College of Texas Mediators – Past Board Member & Treasurer

San Antonio Family Mediators Association – Past Board Member

Awards

CFO of the Year 2014, Dallas Business Journal

Certificate of Merit, Bexar County Dispute Resolution Center; 1985, 1986, 1991, 1996

Who's Who of South and Southwest

Rollo May Doctoral Grant

Community Service

Founding Board Member & Treasurer Alamo Area Mediators Association

Past Board Member San Antonio Family Mediators Association

Past Member Texas Association of Mediators

Bexar County Dispute Resolution Center - Trainer and Mediator 1984 -1999

Alamo Area Mediator Association & College of Texas Mediators – Past Board Member & Treasurer

San Antonio Family Mediators Association – Past Board Member

Publications

“Miles To Equity” Publisher: Baby Back Books 2021

“Senate Bill 1543: Corporate Bonds for School Districts” TASBO Report – Official Magazine of the Texas Association of School Business Officials. Vol. 38 Issue 1, September 2012

“The Blueberry Metaphor” TASBO Report – Official Magazine of the Texas Association of School Business Officials. Vol. 36 Issue 2, December 2010

“Investments: What Do We Do Now” TASBO Report – Official Magazine of the Texas Association of School Business Officials. Vol. 34 Issue 3, June 2009

Selected Presentations

“Introduction to Municipal Finance” Dallas/Ft. Worth TASBO 2018

Council of Great City Schools: **“The Budget Game”** 2016

“Pay for Performance: no more pay latter for Teachers at Dallas ISD” 2016

15th. Annual Summer Conference of Texas Association of School Business Officials, Allen, Texas June 14th-15th 2012. Educational Session – 6/14/2010,

Title: **Control Reports for Management.** Presenters: James Terry, Ph.D., CPA, RTSBA, CPFIM - Director Budget Services

TASA/TASB Convention 2010 Houston Texas. Title: **Saving Money: Are you willing to change the way you do Business?**

Presenter(s): James Terry, Ph.D., CPA, CTSBO, CPFIM - Executive Director Finance & Accounting Services

14th. Annual Summer Conference of Texas Association of School Business Officials, Kerrville, Texas February 17th-18th 2010. Educational Session – 6/17/2010,

Title: **Saving Money: Are you willing to change the way you do Business?**

Presenter(s): James Terry, Ph.D., CSPA, CTSBO, CPFIM - Executive Director Finance & Accounting Services

64th Annual Conference of Texas Association of School Business Officials, Fort Worth, Texas February 15th-19th 2010. Educational Session C – 2/17/2010

Title: **Investment Due Diligence: What does it mean? How Do You Do It?**

Presenter(s): James Terry, CTSBO, PhD D, CPA, Executive Director Finance and Thomas Ramos, District Treasurer, North East ISD.

Others too numerous to list, will furnish on request

Professional Organizations

Selected Life Member of Texas Association of School Business Officials 2018

Elected to the Board of Directors for the Texas Association of School Business Officials, 2010-2013 (TASBO), an independent, not-for-profit professional association, TASBO is dedicated to being the trusted resource for school business and operations in Texas. TASBO is one of the states and province affiliates of the Association of School Business Officials International (ASBO Intl.) which serves members from the United States, Canada, and more than 20 other nations. Established in 1946, TASBO began as a forum for exchanging ideas and sharing information about school business operations in Texas. The Association's center of operations is located in Austin, Texas. TASBO headquarters is located at 2538 South Congress Avenue. Currently, TASBO has approximately 5,600+ members and 29 regional affiliates, representing more than 900 public school districts in Texas.

Advisory Board member; for the Institute of Public Investment Management, Salt Lake City, Utah.

North East Administrator Association – President 1996-97