

CYNTHIA ANN FREY, BA, CPA, CGMA

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Controller, Director, Senior Leader

Proven leader who puts people and mission at the heart of everything. Demonstrated financial and organizational leadership success stems from the relationships built through identifying team members' strengths and developing them for the benefit of the individual, project, and the organization as a whole. On the practical side of things, being knowledgeable, well-organized, and attentive to detail supports effective leadership.

Leadership & Team Management | Member Growth & Retention | Financial Management
Cost Savings Strategies | Skilled Presenter & Facilitator | Relationship Builder | Implementation Expert

PROFESSIONAL EXPERIENCE

AGN International – Americas, Inc.

Director of Global Operations and Regional Director, Americas

January 2019 – Present

Supervised six direct reports for the 501(c)(6) nonprofit CPA Firm Association supporting 45 member firms. Responsible for member outreach and development, financial and operational reporting, financial planning, and accounting. Directly managed a \$3M regional budget. Collaborate with the Global CEO, Regional Board, and Executive Committee to create strategic plans to enhance and grow the organization. Oversight for regional programming, communications and communities; as well as global procedures, information systems and team strategy.

- Promoted to Director over an unstable team of six, reducing staff turnover of more than 50% down to under 15% by leveraging established relationships to create a plan to unify the team. Beginning with a schedule of recurring team and one-on-one meetings virtually and quarterly in-person meetings. Incorporated team-building activities such as community service into team gatherings. As a result, the team regained stability, retaining 80% over the next three and a half years.
- Oversaw major member database software upgrade implementation, which simplified processes, saving \$30,000 on third-party support fees, all while improving the member experience with user-friendly solutions.
- Shifted to external consultants for the IT and event function saving the organization \$80,000 annually and reducing risk.
- Improved productivity through process documentation across all operations areas, including the creation of a Disaster Recovery Plan. Implemented project management software, created templates for recurring use which improved staff onboarding and eased the transition of responsibilities.
- Implemented software programs to replace manual tasks, simplifying processes and creating efficiencies which freed up approximately four staff hours per week to focus on member-facing programs.
- Transitioned the regional leadership committee away from a focus on day-to-day operations to strategic planning activities, leading to the creation of a three-year strategic plan which resulted in clear direction for the organization and clear expectations for staff.
- Established a Technical Resource Center for members to quickly draw on expertise from vetted experts, creating an expansion of their firm's capabilities, providing growth in revenues and client satisfaction. This resource has led to the addition of ten member firms since its launch, bringing over \$100,000 in new annual revenue to the association.
- Instituted subregional communities within the region resulting in increased collaboration among member firms, and increased participation with the organization by all levels of staff, expanding AGN's reach.
- Collaborate with a team of internal talent, third-party vendors, and speakers to create conferences, events, and continuing education opportunities that are instructional and engaging leading to member retention and satisfaction.
- Grew Resource Partner / Sponsorship revenues from \$25k to \$128k.

Member Programs Manager

September 2017 – December 2018

Coordinated member educational programs in the form of webinars and in-person conferences with a shared responsibility for topic-focused member communities.

- Increased focus on member input resulting in a doubling of year-over-year webinar offerings and a 50% increase in webinar program registrations.
- Increased virtual program attendance by 25 - 50% by creating a systematic plan for sending promotional emails to targeted audiences. Positive feedback on the communications plan was supported by a 20% click-through rate.

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- Created an intricate onboarding plan that was automatically triggered when a firm was accepted into membership. Each task was assigned a timeline and responsible party. The detailed plan provided members with a thorough understanding of the organization at a critical point in their membership, cementing their connection and increasing member retention. In addition, it provided clear expectations of responsibilities and deadlines for internal staff.

Other Relevant Experience

Proven track record of optimizing financial performance, budget management, and implementing strategic initiatives. Preparation of financial statements in accordance with GAAP for organizations and individuals, reporting all aspects of financial position to internal management and volunteer boards. Managed human resources, benefits and payroll; as well as fixed assets, accounts payable, and accounts receivable teams. Ten years of experience with preparing Individual, Corporate, Partnership, and Not-for-Profit tax returns.

Association of International Certified Professional Accountants

Technical Manager, Tax Practice & Ethics

Manager, Firm Practice Management Section

Thomas J. Rollins, CPA Senior Accountant, Tax and Financial

Our Lady of Lourdes Catholic Church, Finance Director

Norca Engineered Products, Accounting Manager

Covance Biotechnology Services, Inc., Accounting Supervisor

EDUCATION

BA, Accounting North Carolina State University

TECHNICAL EXPERIENCE

Accounting: Sage Intacct, BILL, Certify/Emburse, Creative Solutions, Quickbooks, Ultra-Tax, Pro-Systems, Oracle, Various customized accounting systems

ASSOCIATIONS

Association of International Certified Professional Accountants

American Institute of Certified Public Accountants

North Carolina Association of Certified Public Accountants

Toastmasters International, Competent Communicator