
MARTIN YUEN

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ACCOMPLISHED CHIEF FINANCIAL OFFICER

- ❖ Highly focused, motivated and experienced hands-on leader, with a history of demonstrated achievements directing strong Finance teams, managing P&L, and overseeing monthly reporting, forecasting, analysis and cash flow.
 - ❖ Develops and deploys internal controls to strengthen the organization, and leads compliance with all applicable regulatory requirements, including SOX.
 - ❖ Consistent track record of significant achievements in finance, operations management, and process improvement with collaborative relationships with multiple departments, including sales, product management, operations, customer service and engineering.
 - ❖ Energetic decision-maker and problem-solver focused on developing effective financial solutions and driving enterprise execution and accountability for results while ensuring the continuous delivery of enhanced profitability; provides financial analysis to drive data-driven decision-making, resulting in stronger business performance.
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CORE SKILLS & COMPETENCIES

- Financial Leadership
 - Budget Development
 - Financial Risk Management
 - Revenue Growth
 - Financial Planning & Analysis
 - Reporting and Forecasting
 - Process Improvement
 - Internal Controls
 - Enterprise-Wide Operations
 - Executive Leadership
 - Staff Development
 - Process Automation
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SELECTED CAREER ACHIEVEMENTS

- **MARTY YUEN & ASSOCIATES and SIGNATURE ANALYTICS** Providing clients experienced, creative, and advanced consultative and business advisory services which elevates their financial performance.
 - **PIONEER MEDICAL GROUP INC.** Introduced a series of improvements that lowered the month-end close process to two days with a 95% rate of accuracy. Successfully orchestrated a significant cost reduction initiative without layoffs or salary reductions.
 - **POWER BALANCE LLC.** Implemented accounting systems that streamlined the process of closing financial records located in four databases.
 - **MILLENNIUM CORPORATE SOLUTIONS.** Led improvements that included the replacement of general ledger with the Agency Management System, the automation of accounting and analysis processes, and the development of a formal budget and forecasting model.
 - **UNITED HEALTHCARE GROUP/PACIFICARE DENTAL & VISION.** Addressed an \$8.5MM pending charge that was discussed with Corporate, resulting in a reduction to \$400K.
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PROFESSIONAL EXPERIENCE

MARTY YUEN & ASSOCIATES, Laguna Hills, CA

(2019-Present)

Consulting CFO

Provides various clients consultative and business advisory including business planning, enhancements of accounting systems, fractional CFO services, securing of bank debt, and enhancement of financial reporting.

- Took over Client's accounting/finance function after sudden departure of Client's internal resources
- Assist Client to obtain expanded credit facility/working capital loan.
- Developed reports for client to quickly identify and react to inefficient spending leading to cost savings/enhanced profitability.

SIGNATURE ANALYTICS, Irvine, CA

(2018-2019)

Consulting CFO

Provides several clients consultative and business advisory including business planning, enhancements of accounting systems, fractional CFO services, securing of bank debt, and enhancement of financial reporting.

- Created eight month's accounting records for an acquired company in less than two weeks for corporate tax filing.
- Stepped into a troubled company to provide leadership and business advisory services to turnaround negative cash flow.
- Guiding commercial retail contractor by developing a strategic plan to grow profitably from \$25m to \$50m in annual revenues.

PIONEER MEDICAL GROUP INC., Cerritos, CA

(2010-2018)

Chief Financial Officer

Led vision, strategy, and execution for all facets of corporate finance and accounting at this provider of a range of health care services for the residents of southeast Los Angeles, with an expanded scope of responsibility that includes Information Technology, Real Estate, Business Office, Risk, Coding

and Purchasing for five legal entities sustaining over \$85MM in combined annual revenue. Consistently delivered results and improvements across Accounting, Risk, and Business Office.

- Collaborated with the CEO to build and execute an operating plan and financial reporting; introduced a series of improvements that lowered the month-end close process to two days with a 95% rate of accuracy.
- Within the first four months in this role, brought all vendors current and achieved positive cash flow; credited with establishing a formal annual budgeting process and budget model, as well as key performance metrics, cash flow forecasting, and new reporting system.
- Built strong relationships with financial institutions to secure loans for real estate, equipment, and working capital.
- Led negotiations and administered employee benefit health plan contracts which lowered insurance costs by over 20% while improving policy coverage.
- Developed a consolidated financial performance package that provides insight into the health and direction of the entire organization in a clear, intuitive format.
- Engaged in the negotiations of purchase and lease agreements for nine corporate locations, with additional responsibility for facilities layout.
- Eliminated up to 20% of expenses through the development of a Specialist Claims Cost Reporting System, contributing to unprecedented earnings.
- Directed the Revenue Cycle Management Department, lowering DSO from 85 days to 60, and payment posting from 21 days delay to 1 day.

POWER BALANCE LLC, Laguna Niguel, CA

(2010)

Vice President of Finance and Administration

Maintained accountability for the success of the Accounting, Finance, Information Technology, and Administration functions for an early stage international business. Led the development and implementation of an annual budgeting process. Position ended after a massive drop in sales following allegations of false advertising.

- Championed the adoption of accounting systems that streamlined the process of closing financial records located in four databases.
- Compiled and produced monthly and quarterly management reports to empower data-driven decision-making on the part of leadership.
- Authored nine key accounting and IT policies, procedures, and best practices.

MILLENNIUM CORPORATE SOLUTIONS, Irvine, CA

(2008-2009)

Chief Financial Officer

Led corporate finance and accounting for this \$13M brokerage and alternative risk management services provider, introducing revolutionary improvements that included the replacement of general ledger with the Agency Management System, the automation of accounting and analysis processes, and the development of a formal budget and forecasting model.

UNITED HEALTHCARE GROUP/PACIFICARE DENTAL & VISION, Santa Ana, CA

(2004-2008)

Director of Finance

Responsible for Corporate Finance and Accounting for a \$1.5B division of this leading healthcare corporation, with responsibility for the month-end close of a \$170M division, over \$250M in SG&A financial forecasts, and the management of billing for 37 full time employees.

- Within three months, transitioned the accounting function from a centralized office; additionally, transitioned the SG&A forecasting for over 125 departments within 45 days with zero issues.
- Addressed an \$8.5MM pending charge that was discussed with Corporate, resulting in a reduction to \$400K..
- Redesigned the financial forecast model from the ground up, leading to an error rate of less than 3% month to month.
- Led the development of a monthly close process in full compliance with GAAP and SOX regulatory requirements.

Early Career

Part-Time Instructor, Santa Ana College, Santa Ana, CA

Associate, Resources Connection LLP, Costa Mesa, CA

Service Line Controller, EPS Solutions, Costa Mesa, CA

Vice President of Finance, El Torito Restaurants, Irvine, CA

Partner, Yuen Johnstone & Associates, Newport Beach, CA

Chief Financial Officer, Multiple Savings Banks, Orange County, CA

EDUCATION

PEPPERDINE UNIVERSITY

Master of Business Administration

CALIFORNIA STATE UNIVERSITY

Bachelor of Arts Degree in Business Administration, Concentration in Accounting