

Geri A. Gregor, CPA

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Professional Licenses & Certifications

Certified Public Accountant (CPA) – May 1989

Construction Project Management – Columbia University on Coursera – April 2018

Construction Cost Estimating & Cost Control – Columbia University on Coursera – June 2018

Professional History and Specialties

Provide Fractional CFO services to the Construction Industry for companies with revenue ranging from \$15M to \$150M. Services include the following:

- Implement and/or redesign accounting policies and procedures
- Assess capabilities of accounting staff and build where a gap may exist
- Build a reporting structure to provide stakeholders with data to make informed and timely decisions
- Develop and implement cash management system and financial budgeting
- Develop and/or enhance contract reporting, including timely WIP Schedules
- Provide bonding companies with information needed to provide and/or continue to provide bonding line
- Raise capital
- Assess software needs and provide direction to implement changes

Provide training/workshops and business assessments to Minority, Women and Local Business Enterprises (MWLBES) who participate in the NYS School Construction Authority construction and procurement contracts.

Extensive experience as a business consultant in areas such as business advisory services, forensic and litigation support, risk management and accounting services. Consulting experience includes contract monitorship, interim CFO, best practices, internal control compliance, accounting services and DBE/WMBE compliance.

Professional History and Specialties (cont)

Co-Partner on restructuring team for a local College. Responsibilities included implementation of cash management process and budget for the College; negotiation with applicable taxing authorities to deal with unpaid taxes; selection of new auditors for College; negotiation with lenders including DASNY for relief of debt service; negotiation with insurance broker to enhance coverage for College while reducing premium.

Interim CFO services for a continuing care health system in process of sale and restructuring. Responsibilities included implementation of cash management system during period of financial stress after loss of profitable subsidiary and lack of resources: negotiated renewal of insurance policies with significant financial savings; managed long standing bond covenant non-compliance; managed year end audit process.

Acquired and serviced engagements for attest, consulting, and tax. Varied industries are serviced, including Construction, Engineering, Not for Profit, Healthcare and Manufacturing.

CFO experience including cash management, implementation of controls, finance reporting and overseeing of human resources.

Provided expertise to develop and implement controls to a number of Professional Service Firms and Not for Profit Organizations to deter fraud.

Provided acquisition due diligence services for prospective buyers of companies.

Provided out-sourced internal audit function for Not for Profit organizations.

Provided training to clients on implementation of policies and procedures.

Education

SUNY Old Westbury – M.S. Taxation, 2015

Manhattan College, New York City, NY- BBA in Accounting, 1985

Career History

Geri A. Gregor, CPA, PLLC
Present - Partner

Reliance Mechanical Services
February 2018 - March 2019 - Chief Operating Officer

Grassi & Co., CPAs, P.C.
July 2008 - January 2018 – Partner

Career History (cont)

Great Performances

August 2007 - July 2008 - Chief Financial Officer

DOAR Litigation Consulting

May 2001 - July 2007 - Chief Financial Officer

Imrex LLC

1989 - 2001- Assistant Vice President, Finance

KPMG

1984-1989 – Auditor

Current Professional/Industry Affiliations

American Institute of Certified Public Accountants (AICPA) – Member

New York State Society of CPAs (NYSSCPA) – Member & Past Board Member and Treasurer (2018)

Business Owners Advisory Council of Long Island – Empowering Female Entrepreneur Committee Member

Professional Women in Construction (PWC) - Board Member and Treasurer

Educational Assistance Corporation (EAC) - Board Member, Treasurer and Audit Committee Member

ACE Mentor Program (ACE) – Current Board Member and Treasurer (2015-2018)

Girl Scouts of Nassau County - Life time member and 100th year Gala Co-Chairperson

Training/Public Speaking

Extensive Continuing Professional Education (CPE) in management and business advisory services and forensic accounting.

- SCA Workshops – Cash Management, Financial Management and Estimating
- Adjunct Professor at the Department of Accounting, Taxation, and Legal Studies in Business at the Frank G. Zarb School of Business at Hofstra University

Training/Public Speaking (con't)

- NYC Small Business Services- “Construction Financial Management & Accounting 101”
- Accordant Users Conference - “Your Construction Business Best Practices - Financial Management and Compliance”
- 2014 New York Accounting Technology Conference - “Maturing of the Cloud”
- AIA of New Jersey Design Conference - “Your Architectural Firm Best Practices Financial Management & Compliance”
- New York State MWBE Forum - “The W Factor: Women Changing the Building Industry”
- Grassi & Co. Seminar - “MWBE Compliance - What the Surety Needs to Know”
- NYC Small Business Services - “Construction Financial Management & Accounting 101”
- Women Builders Council’s “Women Build New York” Conference
- Accubuild Users Conference - “Your Construction Business Best Practices - Financial Management and Compliance”
- CPA.com - “The Rise of the Digital CPA”
- Construction Financial Management Association - “Fraud and Compliance Issues Facing the Construction Workplace”
- NYSSCPA’s Nassau Chapter, CFO Committee - “Key Performance Indicators & Management Reporting”
- Association of General Contractors NYS Construction Industry Conference - “DMWBE Compliance”
- New York State MWBE Forum - “The Construction Entrepreneur - Taking the Right Project”
- Grassi & Co. Construction Executive Forum - “Best Practices - What does your Company Do?”

Publications

- Member Profile Geri A. Gregor, CPA, – NYS Society of CPA’s Nassau Chapter Newsletter

Publications (con't)

- Spotlight: Geri A. Gregor, CPA, Partner-In-Charge Grassi Consulting – Grassi & Co. Advisor
- Spotlight: Geri A. Gregor, CPA, Partner-In-Charge Grassi Consulting – STA
- Internal Controls Tips – Series Wrap Up – Grassi & Co. Advisor
- Fraud Epidemic Hits Another Victim Unit of Tommy Hilfiger Victimized by Senior Employee For\$19 Million - Don't Let Your Company Be Next – Grassi & Co. Advisor
- LIBN Newsmakers: Chief Consultant – Long Island Business News
- Fraud: Avoid Being A Victim – New York Real Estate Journal
- Investigating Refunds, Prevent Fraud and Keep Productivity High – Grassi & Co. Advisor
- The Ins and Outs of Mergers & Acquisitions – Grassi & Co. Advisor
- Benchmarking for Business – Grassi & Co. Advisor
- Increasing Profitability with Lean Six Sigma – Grassi & Co. M&D Advisor
- The Fair Play Act: Are You Classifying Employees Correctly? – STA & Grassi & Co. Construction Advisor
- Operational Review – CFMA Newsletter & Grassi & Co. Construction Advisor
- Building the Budget – CFMA Newsletter
- The IRS Is Well-Equipped to Examine Construction Firms – Grassi & Co Construction Advisor,
- New York Enterprise Report Video Interview – NYER