

BetterBizBooks.com

Dan Ross

E-mail

rossdross@yahoo.com

Personal Website:

BetterBizBooks.com

Present:

Dallas, Tx
(214) 417-2115

OBJECTIVE I want to add value in an organization looking for an energetic, creative and accomplished financial analyst who quickly sees the “big picture” in respective industries. I believe I offer a dynamic communication style, superior motivation and time management skills, as well as decision-making abilities.

EDUCATION

1996-1998 RICE UNIVERSITY,
Houston, Texas.

Jesse H. Jones Graduate
School of Administration.

Master of Business

Administration, May 1998.

Concentrations: Finance
and Marketing.

Activities: **Member**,
Finance & Management Consulting club.

Honors: Jones
Graduate School Scholarship.

1994-1996 UNIVERSITY OF
TEXAS AT DALLAS, Dallas, Texas.

Bachelor of Science,
Accounting, May 1996.

Activities: **Member,**
Finance Management Association;

V.P. Education, V.P.
Membership, Institute of Management
Accountants

1995-96); **Member,**
Accounting Honor Society.

EXPERIENCE

Jan. 2003 – Landsafe Inc. a
Countrywide Financial Coporation, Plano,
Texas.

Present **Financial Analyst II**

- Extensive financial modeling and forecasting. Ie. Budget preparation, productivity analysis, cost accounting, financial reporting.
- Lead contact for financial issues within LandSafe Appraisal.
- Cost/Productivity analysis resulted in multi-million savings for corporation on a full year basis (approx 4% -5% increase in NIBT). This

thought process was implemented across 30% of the company's business and led to strategic decisions being considered.

- Different cost/productivity analysis revealed multi-million room for savings due to staffing, productivity and profitability in another segment of the business.
- Implemented new methodology for budgeting emerging part of the business. This led to greater insights into what was driving the business and where segment growth was occurring. Allowed us to ask questions about the business drivers and identify outliers that wouldn't have been noticed before.

Sept. 1999 – Sanders Morris Harris,
Houston, Texas.

April 2001 **Sr. Financial Analyst -
Telecommunications.**

- Extensive financial modeling/forecasting

including forecasting cash flows, balance sheet and P&L statements.

- First to mention SAB 101 Accounting Rule and implications to CLEC industry in March of FY00.
- Initiated coverage within the telecommunications service industry on selected CLECs (competitive local exchange carriers) and SBC Communications.
- First to mention structural issues at the firm that led to inefficient resource allocation. This resulted in a reorganization and what partly led me to part with the firm.
- First to be cautious about SBC Communications **(January '01 – I can provide a copy of the report)** and valuation concerns due to my belief that DSL deployment costs would be higher than projected and that there was a high

likelihood of a potential slowdown in the wireless industry due to a slowing economy. I believed, and still do, that the RBOCs will continue to penetrate the long distance industry due to lobbying efforts.

- Provided clients with value-added information about technology cycle and implications of capital crunch.
(Telecom Services → Telecom Equipment → Semiconductor) **This resulted in specialized timely updates to clients who then placed appropriate trades to better position their portfolios.**
- Continually improved my communications skills as I needed to interact regularly with clients and the internal sales force to help answer questions and facilitate upcoming news.
- Net Profits exceeded my cost basis by five times my salary.

- Used my extensive network to find out “big picture” issues in telecommunications industry and was early on to communicate about pending financial problems in the telecommunications equipment industry.
References can be provided.
- Met with publicly and privately held companies to assess their capital requirements and needs.

March 1999 – Southwest Securities, Inc.
Dallas, Texas.

Sept. 1999 **Financial Analyst -
Telecommunications.**

- Extensive financial modeling including forecasting cash flows, balance sheet and P&L statements.
- Initiated coverage of three companies in three months focusing on proliferation of wireless worldwide and an increase in teledensity throughout the world (# of phone lines per 100 people). Two

companies experienced appreciable price appreciation.

- Average net return approximated 25% over time in position.
- Met with publicly and privately held companies to assess their capital requirements and needs.

June 1998 - Southwest Securities, Inc.,
Dallas, Texas.

March 1999 **Jr. Financial Analyst -
Semiconductors.**

- Assisted senior equity research analysts in conducting industry and company research, performed financial projections and prepared initial coverage reports along with morning notes published on First Call for companies in semiconductor industry.
- Conducted searches for private companies to help facilitate private financing and corporate finance efforts.
- Established a contact list to facilitate better

interaction with institutional clients and coverage list. This led to a 3x increase in sales revenue.

Summer 1997 Norsig & Associates, Inc., Dallas, Texas.

Intern, Research

Analyst.

- Examined the wireless segment of the telecommunications industry and various technologies of the segment.
- Prepared financial model for a wireless company utilizing subscriber growth, country populations, cellular penetration rates, royalty estimates, product margins, and other factors.
- Analyzed the ADSL (Asynchronous Digital Subscriber Line) segment of the telecommunications industry and reviewed five firms. Each company was evaluated based on numerous criteria.

- Established entry and exit prices as well as stop losses for particular investments. Companies mentioned included Orckit Communications, Amati Technologies, Globespan, Qualcomm and Texas Instruments. Each company generated returns of over 200% after I left.

Spring 1996 Merrill Lynch, Dallas and
Plano, Texas.

Intern, Sales Group.

- Obtained new clients through public databases.
- Performed equity research / mutual fund research for client investment.
- Analyzed 25 stocks per week using trend and technical analysis.
- Designed portfolio which beat S&P 500 by 50% in four months.

1994-1995 Nortel Networks,
Richardson, Texas.

**Jr. Accountant, Cost
Accounting & Joint Venture
Accounting.**

- Analyzed \$3 million annually of warranty costs to determine product quality and timely financial reporting.
- Analyzed work in process inventory identifying slow-moving inventory primarily for variance analysis purposes.
- Allocated costs to departments - useful for performance evaluations.

Summer Nortel Networks,
Richardson, Texas.
1992 & 1993 **Cooperative Intern,**
Engineer's Assistant.

- Aided senior technicians in the operation of digital switches.
- Assisted customers in First Application System Tests - test runs of software applications on digital switches to foresee any problems.

OTHER

Computer Skills: MS Access, MS Excel, MS Word, MS PowerPoint, MS Front Page. I worked on Oracle general ledger many years ago and quickly learn proprietary systems (Stock Valuation and Accounting).

Hobbies: Weightlifting, skiing, reading (business and sociology / pop culture primarily – my website, BetterBizBooks.com mentions some of the books I feel could be of value to others and has a link with my economic analysis of the consumer in the U.S.)