

**Thakur D. Persaud, MAAT, FIPFM, MBA**  
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**Summary of Qualifications:**

- Focus on operations management, accounting, investments and information systems for corporate and not-for-profit organizations
- Experience managing the financial and operations section of trade associations and for-profit organizations
- Ability to learn new concepts quickly, multi-task, work well under pressure, and communicate ideas clearly and effectively
- Exceptional knowledge of business practices and accounting regulations
- Strong finance, human resources, information technology and office management background, combined with merger and acquisition experience
- International experience working for British and Caribbean firms in Guyana, South America

**Areas of Expertise:**

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|------------------------|-------------------------|----------------------------|
| * Leadership           | * Human Resources       | * Information Technology   |
| * Accounting           | * Budgeting             | * Not-for-Profit Taxation  |
| * Contract Negotiation | * Operations Management | * Multi-Company Management |

**Professional Experience:**

**Chief Financial Officer**

**Plumbing-Heating-Cooling Contractors—National Association &  
PHCC-National Educational Foundation, Falls Church, VA**

**2006 to present**

Fiscal oversight of 4,100 member 501(c)(6) trade association, its three enhanced service groups (\$7 million annual budget), 501(c)(3) educational foundation (\$1 million annual budget and \$10 million in reserves), and Political Action Committee. Direct oversight of Finance, Investments, Accounting, Dues and Pledges billing and payments Human Resources, Management Information Systems, Convention and Meeting registrations, Publication sales and pricing, Building management/Tenant relations. Attend Board of Directors, Board of Governors and Executive Committee meetings; staff liaison to various committees.

- Prepare nine (9) financial reports for the governing boards and management staff for the association, the educational foundation and the trustees of the enhanced service groups
- Reformatted and implemented financial systems and internal controls resulting in timely and easy-to-understand monthly financial reporting
- Streamlined financial reporting to the board of directors and membership via electronic format beginning in 2007 resulting in cost savings of over \$20,000 annually
- Established budgeting system to meet Board of Directors' goals and to involve staff in "hands on" budgeting. Encouraged staff directors to take ownership of their respective sections of the annual budget
- Eliminated the need for time slips for exempt employees beginning January 2007, reducing cost by over \$75,000 annually
- Completed conversion of accounting software (Solomon IV) used to generate financial reports and implemented successful interface with membership database software.

**Director of Finance & Operations/CFO**  
**Truckload Carriers Association & Affiliates, Alexandria, VA**

**1998 – 2006**

Fiscal oversight of 1,000-member 501(c) (6) trade association with \$4 million annual budget, and three 501(c) (3) trade associations, and the Political Action Committee. Direct oversight of Finance, Investments, Accounting, Management Information Systems, Human Resources, Dues and Pledges billing and payments. Attend Board of Directors, Executive Committee and Officers meetings; staff liaison to various committee.

- Coordinated the daily activities of four trade associations while there was no president on site for a period of nine months
- Worked on the conversion of accounting software (Solomon IV) used to generate financial reports and implemented successful interface with membership database software; completed implementation of all modules in database software modules. Trained and supervised personnel in computer input and use. Performed problem solving/trouble shooting.
- Prepare financial reports for the Boards of Directors for the association and foundation; established budgeting system to meet Board of Directors' goals and to involve staff in "hands on" budgeting
- Led the effort in updating the Network System [2005] to be compliant with current technology
- Wrote the articles of incorporation and bylaws for one (1) 501(c)(3) organization
- Completed applications for three (3) 501(c)(3) organizations and was successful in obtaining the determination letters classifying the associations as public charities
- Was successful in ensuring that the newly formed 501(c)(3) organization was self-sufficient and generated a net income within three (3) years of formation

**Manager of Accounts & LAN Administrator [promoted to director]**  
**Truckload Carriers Association & Affiliates, Alexandria, VA**

**1996 - 1998**

- Led the effort in installing new Network System to operate with current technology. Worked with consultants to select design, and install new computer software and hardware
- Provide technical support to users on software use and perform maintenance on desktop
- Reformatted and implemented financial systems resulting in timely and accurate monthly financial reporting to management
- Changed record keeping for investments from paper general ledger to electronic format that resulted in simpler and faster reporting to the investment committee

**Financial Controller [International Organization]**  
**Clico Life & General Insurance Co. (SA) Ltd, Guyana, South America**

Fiscal oversight of four (4) Guyana based companies of a Trinidad, WI Insurance Conglomerate. Direct oversight of Finance, Investments, Accounting, Human Resources, premium billing and payments; an ex-officio member of the Board of Directors.

- Completed conversion of accounting software (ACCPAC) used to generate financial reports and implemented successful interface with policyholders' database software. Trained and supervised personnel in computer input and use.
- Setup system to easily track and collect receivable from insurance agents
- Developed business plan in conjunction with executive staff to receive approval from the CL Financial Limited Board of Directors in merging and forming a life and general insurance company, in Guyana, South America
- Prepare consolidated financial reports and made presentations to the Board of Directors.
- Advised the board on investment opportunities for over Guy\$350 million

### **General Professional Experience:**

#### ***Administration, Human Resources & Auditing***

- Managed and supervised the office manager and administrative staff.
- Annually reviewed the insurance needs of the association with service providers
- Conducted audit and discussed ways to improve processes with departmental managers.
- Wrote system documentation to comply with new auditing guidelines on internal control
- Participated in the development of new auditing reporting systems
- Interviewed 401(k) plan providers and conducted annual review to ensure compliance with applicable laws.
- Screened and interviewed prospective employees

#### ***Accounting, Investment & Management***

- Work with Investment Advisors in the allocation of both the Association and Foundation Funds
- Completed all documentation when changing Investment Banks and Advisors for both the association and foundation
- Participated in writing and implementation of a three- and five-year business plan for an insurance company and trade association
- Managed and supervised teams of four to twelve professional and clerical staff

#### ***Management Information Systems & Report Writing***

- Installed and maintained Novell and Microsoft Servers (Windows Servers 2000 and 2003, Windows Small Business 2003 Operating Systems, including Exchange Servers) and Microsoft Office Applications
- Constructed, modified and updated Crystal reports for membership presentation.
- Maintained working knowledge of the iMIS, MemberMax and NetForum membership database systems
- Supervised MIS consultants for networks, accounting and membership databases

### **Education & Training:**

- Master of Science in Business Administration – Management, Strayer University, Alexandria, VA, USA – September 2006
- Bachelor of Science in Accounting (with honors), Strayer University, Alexandria, VA, USA
- Certificate in Management of Computerized Information System, Guyana, South America
- Certified as an Accounting Technician, Accounting Technicians Ltd., (MAAT) United Kingdom (Fellows)-Institute of Professional Financial Managers (FIPFM), United Kingdom
- Advanced Solutions International, Inc. (ASI)
  - iMIS –Client/Server Application Course
- Industrial Society of London
  - Senior Management Development

### **Professional Affiliations:**

- Member - Institute of Management Accountants
- Fellow Member - Institute of Professional Financial Managers
- Member - Association of Accounting Technicians Ltd.