

# KAREN BREEN, CPA\*

(303) 419-6592 | kbreen\_99@yahoo.com

<https://www.linkedin.com/in/karen-breen-87377213/>

## EMERGING BOARD MEMBER

Visionary financial leader with proven success providing executive guidance and strategic consulting on capital market alternatives, IPO readiness, global treasury operations, M&A, business development and new market entry.

Career highlights include:

- 4 years as *Global CFO* for a P/E-backed company operating in the U.S., Africa and other emerging markets
- 8 years as *Global Treasurer* for a \$2B publicly traded company operating on five continents
- 20 years as *Investor Relations Officer* leading 3 public companies (Fortune 500 & Russell 2000) through the IPO process
- 6 years in *Business Development* building market share for companies entering Colorado
- *Board of Director and Chapter President* for Financial Executives International, a finance leadership organization
- Led crisis communications for several companies and successfully navigated a potential delisting, shareholder lawsuit and company bankruptcy

## AREAS OF EXPERTISE

C-Suite & Full P/L Responsibility	Advisor to CEO & Board of Directors	New Market Entry
IPO Readiness	Establishing Company Vision	Business Development
Debt & Equity Capital Markets	SEC Expert	Risk Management & Analysis
Mergers & Acquisitions (M&A)	Investor & Public Relations	Diversity, Inclusion & Governance
Post-Merger Integration	Crisis Communications	Cross Functional Collaboration

## BOARD OF DIRECTOR EXPERIENCE

**Financial Executives International (FEI), Colorado Chapter** **2017—Present**

*Chapter President, 2020—2021; Board & Committee Member, 2017—Present*

*With more than 8,000 members across diverse industries, FEI focuses on member development, networking, career management, research and publications for corporate finance executives.*

- Create marketing strategy, relevant programming and secure speakers to drive membership for this nonprofit dedicated to supporting financial leaders in career development and networking.
- Championed membership committee and increased membership by 20%.

## EMPLOYMENT HISTORY

**BMO Harris Bank – 8<sup>th</sup> largest bank in North America** **07/2021—Present**

*Director, Colorado*

*Leverage extensive network to build brand awareness and onboard new clients.*

**Embark Finance & Accounting Advisory Firm** **05/2020—07/2021**

*Managing Director, Colorado*

*Drive business development and market expansion through establishing client and referral relationships. Key initiatives include:*

- Doubled client base by networking, community development and strategic marketing plans.
- Built relationships with industry groups and local nonprofits, leveraging partnerships to identify new client prospects.
- Planned and coordinated promotional activities such as webinars, events and meetings.

**PayDay HCM – Human Capital Management Firm providing Hire to Retire SaaS Platform** **09/2018—05/2020**

*Area Director*

*Opened the Colorado market through brand development, business growth strategy and targeted messaging.*

**Wells Fargo NA****05/2016—09/2018**Business Development Officer

*Leveraged professional network of strategic relationships to identify, acquire and build investor relations with \$100M+ companies, successfully growing the Colorado market share.*

- Developed a pipeline of 30+ prospects with \$150M+ in lending and funding potential.
- Exceeded revenue and profitability goals by more than 10%.

**Mobile Accord, Inc. – P/E backed company providing mobile market research in emerging markets****05/2012—01/2016**Chief Financial Officer (CFO)

*Built a small, high-performing, cross-functional team to support the scalability of this mobile technology company. Directed media communications, investor relations, insurance, human resources, tax accounting, real estate and operations administration.*

- Partnered with the company's President to conduct outreach, target potential investors and raise \$40M+ in funding.
- Developed company vision, long-range goals and strategic plans.
- Established offshore finance and accounting back-office team in Nairobi, Kenya.
- Implemented new ERP to fully automate manual processes
- Oversaw the growth and development of the M-Give program, Mobile Accord's nonprofit foundation.
- Led the successful divestiture of a non-core entity.

**TeleTech Holdings, Inc. – leading provider of BPO Solutions for Fortune 1000 and Global 2000 clients****05/2001—05/2012**Global Treasurer and Investor Relations Officer

*Led global investor relations and treasury activities for this \$2B company, including capital markets, hedging transactions, leasing, share repurchase and global cash management.*

- Hired, led and provided performance management for a team of 50 financial planning and analysis professionals.
- Managed commercial banking relationships and negotiating revolving credit facilities up to \$500M; achieved improvements to covenant leniency and operating flexibility.
- Partnered with Blackstone to select four global investment banking firms to underwrite a secondary offering by the CEO; wrote the prospectus summary (business overview, strategy, and competitive strengths) and coordinated a three-week global road show.
- Drafted and reviewed SEC filings, including Forms S3, 10Q, 10K, and proxy statements.
- Negotiated debt waiver and amendments with a group of banks and private lending groups, successfully restructuring prior synthetic lease and private placement agreements.
- Implemented a centralized, global cash management capability with Bank of America across 19 countries.
- Applied deep knowledge of industry and competitive landscapes to manage multiple large-scale M&A opportunities.

---

## ADDITIONAL CAREER

---

**VP of Investor and Public Relations:** Rhythms NetConnections – early broadband provider via Digital Subscriber Lines

**VP of Investor and Public Relations:** TeleTech Holdings – global BPO provider operating on five continents

**Director of Investor and Public Relations:** ACX Technologies – spinoff of Molson Coors non-beer businesses

**Director of Financial Reporting:** Adolph Coors Holding Company – parent to Molson Coors, CoorsTek & Graphic Packaging

**Manager of Global Consolidation and SEC Reporting:** H.J. Heinz Parent Company

**Audit Senior:** Ernst & Whinney – Chemicals, Steel, Healthcare

---

## EDUCATION AND CREDENTIALS

---

**Bachelor of Science in Accounting**

Pennsylvania State University

\*CPA is currently inactive – moving to active status in 2022