

# Jan Rowell, CPA

Jan is a CPA with over years of experience in Big 4 public accounting, industry and financial consulting.

## Professional experience

**Huron Consulting Group** — Director

**PricewaterhouseCoopers** – Assurance Manager

**Independent Consultant** - CPA firms and financial institutions

**The Westminster Schools, Inc.** – Controller

## Representative examples of Jan's professional experience include:

- Review of financial institutions' loan review and related allowance for loan losses for commercial and real estate portfolios; identified documentation exceptions, allowance and rating adjustments needed prior to regulatory examination.
- Independent trust department audit.
- Designed and implemented accounting systems, including technology conversion, prepared extensive business forecasting models for senior management.
- Assisted in financial institutions' management analysis of commercial real estate loan portfolio for adequacy of loss reserve and regulatory compliance.
- Provided support to internal audit management: FAS 157 internal control and financial statement audits of financial instrument assets and liabilities, FDICIA testing of multiple control areas, and other financial statement and controls testing.
- Interfaced with federal regulatory authorities on behalf of clients; assisted with compliance reporting and examination response.
- Evaluated accounting and finance personnel performance and effectiveness.
- Evaluated efficiency of accounting department and profit centers with related recommendations for improvement.

## Provided assistance closing and liquidating failed institutions to a financial services industry federal government agency, as part of a select group of vendors.

- Managed financial institutions practice throughout southeastern United States; consultant and technical resource for national practice, providing on site assistance to clients and engagement teams throughout the U.S. Clients included banks and bank holding companies, real estate investment trusts, savings and loan associations, mutual savings banks, REITs, credit unions, and mortgage banks.
- Provided consulting services to consortium of financial institution clients and others in collaborative work out of significant REO of undeveloped and partially developed coastal islands, condominium projects, and planned residential developments.
- Reviewed other auditors' working papers for Conservator of a failed national bank.
- Co-authored Firm's national training materials for 40 hour savings and loan association training course.
- Managed and supervised assurance engagements in a variety of industries including financial institutions, real estate construction and development, insurance, manufacturing, local government, education and non-profit organizations.
- Provided consulting services to clients in development of strategic and operational business plans and mergers and acquisitions, with analytical projections and financial forecasts for decision making, financial management, technology, development of revenue enhancement and cost reduction strategies, and retention and compensation of key personnel.

ReGroup Advisors, Inc.

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- National training course instructor for financial institution and assurance professional training.
- Managed accounting functions for nonprofit educational institution with enrollment of 1800, assets exceeding \$300mm (including \$200mm endowment), and revenues of \$50mm
- Researched, prepared and presented institution financial, informational and tax reporting to Finance and Investment Trustee Committees; staff liason to Committees.
- Participated with counsel in draft of documents for institution's initial \$26,000,000 tax exempt bond issue, including negotiation of favorable terms and provisions of compliance.
- Increased short term investment income through effective Treasury management of cash and short to intermediate term investments, tax-exempt bond issuance and related construction project, and negotiation of optimized banking service relationship
- Improved accounts receivable management for 1800 accounts, delinquent account collection, economically managed billing; initiated pilot program for web based remittances.
- Enhanced controls through redesigned purchasing and expense reporting procedures.

## Education and certification

Bachelor of Business Administration, Accounting, Magna Cum Laude, Phi Kappa Phi,  
University of Miami  
Certified Public Accountant

## Community

Chairperson, Governance Board, North Springs Charter High School  
Task Force Chairperson and member, Georgia Society of CPAs  
Girl Scout Leader  
Church Youth Leader, Sunday School Teacher  
Public School volunteer tutor