

TERESA S JAMES, CPA CGMA



For over 23 years Teresa, as the Senior Vice President/Controller for Worth & Associates, was responsible for financial reporting for over 3 million square feet of commercial real estate: 55+ buildings (midrise and flex) within 55+ limited partnerships and limited liability companies. Teresa oversaw the entire conglomerate and all business lines of investing, developing, leasing, financing, and property management. Extra accounting fun was found in preparing the semi-annual budgets and semi-annual Market-Cost-Tax basis financials. As the Chief Accounting Officer, Teresa proudly managed an accounting team of nine focusing on rolling projections and identifying icebergs. Additional responsibilities included all insurance lines, property tax protesting and litigation, employee benefits, and managing human resource functions [40+ employees within 3 employers.]

Teresa's priority was servicing the investors. This included the preferred return waterfall computations and partner distributions (both operating and sales), collecting cash calls, and issuing over 250 K-1s twice a year. Her additional core responsibilities included managing over 90 bank accounts and signing for all transactions on acquisitions, sales, loan closings, construction loan draw requests, payroll, 401k and maintaining control over operating payables as well.

Teresa's Definition Of "Accounting Fun" Is Implementing Function From Chaos

- Listening to the stakeholders to grasp their vision & establish goals to achieve them
- Empowering the frontline teams to identify & create new processes & streamline existing ones
- Operating with business partners (vendors) to strengthen results
- Analyzing current software and upgrading technology to improve outcomes

PROFILE

Teresa provides insight and solutions for Family Businesses and Small Companies \$5 to 50 million in annual revenue.

SPECIALTIES

Process Standardizations & Improvements

Financial Reporting Internal & External

Forecasting & Budgeting

401K Implementation & Governance

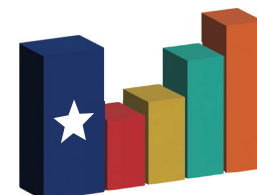
Real Estate, Construction & Financial Service Organizations

Board Member [14+ Yrs] For Habitat For Humanity Of San Antonio

CONTACT

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CENTRAL TEXAS CFOs
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