

Advisory Group Application

Step 1

Application for Appointment to Whatcom County Advisory Groups

Public Statement

THIS IS A PUBLIC DOCUMENT: As a candidate for a public advisory group, the information provided will be available to the County Council, County Executive, and the public. All advisory group members are expected to be fair, impartial, and respectful of the public, County staff, and each other. Failure to abide by these expectations may result in revocation of appointment and removal from the appointive position.

Title	Mr.
First Name	Jacob
Last Name	Jones
Today's Date	1/7/2025
Street Address	██████████
City	████████
Zip	████
Do you live in Whatcom County?	Yes
Do you have a different mailing address?	<i>Field not completed.</i>
Primary Telephone	██████████
Secondary Telephone	<i>Field not completed.</i>
Email Address	████████████████████

Step 2

1. Name of Advisory	Business and Commerce Advisory Committee
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Group

Business and
Commerce Advisory
Committee Positions

Internet technology, Other for profit industry

2. Do you meet the
residency,
employment, and/or
affiliation requirements
of the position for
which you're applying?

Yes

3. Which Council
district do you live in?

District 3

4. Have you ever been
a member of this
Advisory Group

No

5. Do you or your
spouse have a financial
interest in or are you
an employee or officer
of any business or
agency that does
business with
Whatcom County?

No

6. Have you declared
candidacy (as defined
by RCW 42.17A.055)
for a paid elected office
in any jurisdiction
within the county?

No

You may attach a
resume or detailed
summary of
experience,
qualifications, &
interest in response to
the following questions

Attached

7. Please describe your
occupation (or former
occupation if retired),
qualifications,
professional and/or

Technical Accounting Advisor working for Dell-Boomi since August 2021 with a total of over 16 years of Accounting and Finance experience.
Intrapreneurship Certification from the Center for Entrepreneurial Innovation which focuses on discovering, evaluating, and

community activities,
and education

exploiting new business opportunities.
Coach for youth football, basketball, and baseball.
Kids Camp Counselor in college for 3 years.
Graduated 2001 in the top 3% and was selected for the local TV
interview as the "Scholar Athlete of the Week" at Katy High
School.
Played football for multiple colleges and member of Beta Alpha
Psi honors society graduating with a Math minor and Accounting
major.
Individually inducted into the Katy ISD Athletic Hall of Honor in
2018

8. Please describe why
you're interested in
serving on this
Advisory Group.

My family and I moved to Whatcom County over the Summer all
the way from Katy, Texas. Throughout the moving process, I
spent several hours researching Whatcom County and am eager
to contribute my time by connecting with the efforts of the
Business and Commerce Advisory Committee. Hoping to be
accepted as a contributing and vital member of this community,
please give me this opportunity to serve my fellow residents in
the best way that I can.

References (please
include daytime
telephone number):

Erin Beltramini (doctor in Whatcom County) - 832-244-1387
Wayne Singleton (CFO Houston, TX) 631-327-0639
Andrew Hooper (CFO Texas) 832-341-5290

Appointment
Requirements

I understand and agree

Signature of applicant:

Jacob W Jones

Place Signed /
Submitted



(Section Break)

JACOB W. JONES

SELECTED ACCOMPLISHMENTS

- Financial risk management, ASC 606 analysis, planning, modeling, forecasts, reporting, reconciliations, & journal entries
- Purchase Price Analysis & Acquisition Integrations → 3 distribution, 2 energy, 10 regulations, 3 SaaS & Ecommerce
- Streamlined banking, billing, inventory, payroll, AR and AP activities, improving efficiency, productivity, & profitability
- Respected by staff as an approachable leader who puts operations first while maintaining vigilance on accounting
- Reduced business risks and manual processes by empowering employees with user-friendly Excel tools ***Excel Super-User***
 - ERP Implementations & Multiple Entity Setups → Sysco (AS400-to-SAP) || RigNet (Astea-to-Navision-to-SAP) || DISA (QuickBooks & Sage-to-Great Plains) || HungerRush (QuickBooks-to-NetSuite) || Dell-Boomi (Excel-to-NetSuite)
 - Value-added: Sysco \$70k per year ~ RigNet \$60k per year ~ Aggreko \$250k per year *plus* \$241k one-time recovery ~ DISA \$50k per year *plus* \$295k one-time recoveries ~ HungerRush **\$1.3M per year** *plus* \$1.2M one-time Sales Tax reduction

PROFESSIONAL EXPERIENCE

DELL-BOOMI (Remote, USA)

Aug 2021 – current

Technical Accounting Advisor

- Provide accounting guidance & design processes that apply internal controls around Order-to-Cash & Revenue Recognition
- Build financial models that isolate system variances & provide the immediate visibility needed to close the books timely & accurately
- Reconcile NetSuite to Ernst & Young's manual reporting files to determine the drivers behind multiple types of variances
- Adjust Revenue Arrangements in NetSuite and advise the billing team/EY to make other needed corrections to the system/manual files
- Persistent passion for unwinding the Ernst & Young manual reporting files was needed for manual Sales Tax reporting and to prepare NetSuite to be utilized for financial reporting - Create & validate new reports & datasets in both NetSuite & Salesforce
- Restate revenue recognition to align with ASC606 rules and regulations

(Reason for leaving: to re-enter accounting & finance after the COVID pandemic)

ROYAL JUNIOR HIGH, Brookshire, TX

July 2020 – July 2021

Math Teacher and Coach

- Develop the mathematical and athletic gifts of our youth population by using interactive and engaging methods
- Football, Basketball, Track, and Chess Coach - Train students to compete and realize potential

(Reason for leaving: Due to pandemic, restaurant industry declined - all Finance laid off including CFO, VP of Finance, and Accountants)

HUNGER RUSH, Houston, TX *SaaS & E-commerce \$50M

January 2019 – May 2020

Revenue Assurance Manager

- **Recruited by former managers** to assess Financial Risks, Reporting, ERP Implementation, Due Diligence & Integration
- Provided financial models to address lender concerns & provide support for **COGS, Unbilled Revenue, Fixed Assets, and Inventory**
- Reviewed monthly installation revenue per **ASC 606** to ensure proper revenue and related commission cost recognition
- Analyzed and delivered **SaaS KPI metrics** to upper mgmt. - MRR, Churn, Retention, ARPA, stickiness, LTV, CAC, conversion rate
- Developed a three-way **cost-to-revenue** reconciliation that identified unbilled services ~ **\$36,000 per month of recurring revenue**

Senior Financial Analyst

- Provided post-close analysis to support **opening balance entries** for deferred revenue, prepaid assets, and other accounts
- Independently found an **annual leak worth \$494,286 of revenue** by reconciling financial data between **NetSuite and Salesforce**
- Reduced **\$1,179,763** from an aggressive **Sales Tax** assessment and reconciled **Avalara to NetSuite** by ship-to address (E-commerce)
- Identified synergy savings concerning AR collection methods to result in a **\$400,000 reduction of annual credit card fees**
- Streamlined **Order-to-Cash** and Credit Card Pull reconciliations by building a powerful Excel model ~ **4 days to 4 hours**
- Responsible to calculate **Sales Commissions** and manage accruals/deferrals related to revenue and cost recognition

(Reason for leaving: contacted by former DISA manager & former RigNet manager who requested my service at HungerRush)

DISA, Houston, TX *SaaS \$500M

January 2018 – January 2019

Senior Accountant / Financial Team Lead ~ Acquisitions (25% Travel)

- Responsible for Purchase Price Analysis, Intercompany Management, & **Financial Modeling for over ten acquisitions**
- Prepare for IPO with detailed ASC 606 analysis and GAAP implementations
- Key contributor to visit acquisition sites and begin the integration of accounting processes and data into Great Plains - Dynamics
- Initiated research and delivered supplemental analysis that resulted in a **\$45,014 recovery** from seller holdback payment (Amarillo)

- Uncovered \$250,000 of AP items that had been paid but were not a part of the purchase agreement. Complex analysis by invoice was needed to support the 2017 adjustment, and required learning a new financial system called MAS90 (Pasadena)
- Wrote two macros that automated AP processes, eliminating one 8-hr process and one 4-hr process in Excel (Houston)
- Automated AP coding from **Concur** for company credit card expense accrual by using advanced Excel formulas (Houston)
- Built an advanced Excel algorithm to automate a 3-day Bank recon into a half day; wrote a macro that eliminated 6-8 hours of manual work **reducing billing cycle** by 1 day (San Diego)

(Reason for leaving: presented with an opportunity to integrate thirteen acquisitions within one year)

AGGREKO, Houston, TX

\$2B

October 2016 – January 2018

Senior Accountant / Business Support Analyst

- Worked with both external and internal auditors to verify control and accuracy of the financial statements.
- Enhanced reconciliation processes for: accruals, deferrals, prepaid, intercompany, loan, rebates, medical, FSA, and inventory.
- Found AP sub-ledgers to be inaccurate and facilitated corrective action to have operations use credit memos rather than JEs.
- Created a project outside of assigned duties which revealed that customers were taking invoice discounts in excess of contract terms.
 - Audit for one customer resulted in a **recovery check ~ \$241,189 back to Aggreko** and **\$70k/year leak stopped**.
 - The new reports & Excel algorithms created now serve as the backbone to Aggreko's new ability to quickly monitor customer discounts with ease, which both reduced DSO and increased revenues.
- Gathered FSA data and created a 3-way reconciliation method that uncovered a **\$25,000 cash leak** to employees in 2016.
- Notified Legal of the need to amend the wording of customer agreements to align with intentions of the rebate structure.
 - Rebate payment revisions resulted in more savings: Valero \$55k, JCI \$20k, TVA \$17k, Comfort Systems \$6.3k, etc.
- **Reduced work hours** by automating Intercompany ~ check file (financial reporting), support file (billing), recon file (offset items)
- Completed National Operations cost accounting, budgeting, modeling, and forecasting. Analyze financial and operational data to assist with financial, capital, and manpower planning.

(note: this Manager rehired me later at HungerRush, and the company offered me a pay-to-stay contract to train the new LA staff)

RIGNET INC., Houston, TX

***SaaS**

\$500M

January 2014 – October 2016

Senior Accountant (Earned the Passion for Excellence Award)

Cost accounting working with Engineering to **reconcile multiple entities**. Ensure close adheres to SOX controls, Tax initiatives, Treasury and Operation goals. Analyze cost/revenue standards & financial variances. Compile monthly forecasts, annual budgets, & **strategic plans**.

- Built **Financial models** & clarified variances to the VP & GM for the Offshore Budget PowerPoint presentations
- Exceeded manager expectations with a two-hour turnaround on a request for an automated **Excel revenue forecast model**
- Independently identified a key weakness & implemented a permanent solution to **streamline PL analysis** by vendor
- Significant contributor to SureTax setup and analysis to verify accuracy of results across all legal entities
- **Led SAP ERP implementation** efforts with process-engineering and system coding required for business-specific needs
- Voluntarily pursued process efficiency & reduced time to record payroll from **4 days to 2 hours** (11 int'l payroll journals)
- Managed capital expenditures and ensure that spending is accurately captured in the general ledger

Accountant

Accounting lead for the Inmarsat Integration Team to strengthen AR/AP/billing and drive financial outcomes. Financial correspondent between Inmarsat & RigNet. **Designer of Working Capital package for Inmarsat post-close review**.

- Support post-**IPO** with data requirements and adherence to rigorous **SEC** accounting and disclosure guidelines
- Identified opportunities to streamline using existing data import routines which eliminated several days of billing data entry
- Discovered inaccuracies in site count reconciliation and corporate ARPU calculations; mended revenue routine within Excel
- Revised Inmarsat financial data to **allocate the acquisition by legal entity** based off taxes and service order agreements
- Performed detailed reconciliation cleanup; monitored customer contract novation and verified AR purchase collections
- Created 5 macro workbooks that streamlined Inmarsat billing procedures; **2 days of monthly Chevron/Shell needs down to 2 hours**
- Detailed validation of data migrations from Astea to Navision to **SAP B1**

(Reason for leaving: opportunity from a friend to help on a major acquisition project with high visibility)

SYSCO BUSINESS SERVICES, Cypress, TX

\$10+B

October 2012 – January 2014

Accountant II (promoted to Track F)

Accounting liaison for five SYSCO Operating Companies: Maryland, Jacksonville, San Diego, San Francisco, and South Florida.

Reconciliation and JE's include: Depository & Disbursement Banks, Intercompany, Petty Cash, Cash-in-Transit, Vouch-not-charged/Charge-not-vouched. Build automated Excel templates and optimize accounting process standardization. **ERP Implementation**.

- Redirected an instructional meeting and independently reduced errors and preparation time from 45 minutes to 2 minutes on a weekly journal entry by creating an **automated Excel model** still used today → more than \$70,000 per year savings
- **Promoted** to the highest-level accountant (track F) within a few months & led training presentations of the tool to 25 accountants
- Chosen by supervisor to coordinate the standardization of deposit applications across all sixty-four operating companies
- Adapted to rapid centralization; trained newly on-boarded accountants to meet all month-end deadlines and keep clean reconciliations

(Reason for leaving: to work on a special centralization project for a Fortune 500 company)

MEXCOR INC., Houston, TX

\$50M

April 2010 – October 2012

General Accountant (promoted to Accounting Manager)

Maintain full charge of all accounting functions including AP, AR, GL, Financial Reporting, Inventory Control, and Payroll. Work closely with business managers to review costs and identify areas for improvement. Configure Borrowing Base Certificates (AP/AR/inventory)

- Detailed the general ledger to divisions and cost centers; adjusted and **rebuilt financial statement interfaces**
- Reconciled inventory at multiple warehouse acquisitions; make adjusting entries to balance GL with perpetual inventory system
- Enhanced and organized a month-end close with complex accrual calculations; review and post all entries to the general ledger
- Coordinated year-end financial audits, ongoing periodical audits of lenders, and workmen's compensation audits
- Single-handedly managed payroll processing and recording for 150 employees; as well as Sales Tax Filings
- Created successful internship program; trained accountants and interns on tax submissions, journals, etc.
- Advised and implemented necessary change in commission payment procedures; coached sales reps on accounts receivable

MEWBOURNE OIL COMPANY, Tyler, TX and Woodward, OK

May – August 2004

Summer Intern

- Compared physical vs. economic lives of oil wells using a profitability analysis
- Utilized **job cost accounting** to create financial reports that track the various types of wells
- Reviewed net present value assessments prior to drilling, in order to ensure wise investments
- Studied drilling methods, monitored well performance, and facilitated corrective processes as necessary

EDUCATION AND PROFESSIONAL DEVELOPMENT

University of Houston - Bauer College of Business, Houston, TX

Bachelor's degree in Accounting, 2010

- **Math Minor**
- Beta Alpha Psi Honors Program, Corporate Relations and Fund-Raising Committee
- TE/FB, UH Cougar Football Team – Sheraton Hawaii Bowl
- UH Dean's List
- National Scholars Honor Society
- CEI Intrapreneurship Certificate (Center for Entrepreneurship Innovation)

HCC program hosted by Sysco Business Services in 2012

- Excel I, Excel II, and **Excel III** Certifications *****Excel Super User**

*Individually inducted into the Katy ISD Hall of Honor in 2018 & televised interview as **Houston's Scholar Athlete** of the Week in 2000*

SOFTWARE SKILLS & QUALIFICATIONS

Software: Proficient in multiple business software packages: Oracle NetSuite, SalesForce, Avalara, Concur, Dynamics Great Plains, Navision, SAP, QuickBooks, Sage MAS90, M3, Tagetik, Astea, AS400, Cartesis, Apprise, Access, PowerPoint, Blackline, and Excel (Pivot Table & Lookup analysis, Macros, Jet Reporting, Index, Match, Conditional list)

Qualifications: Technical competence in US GAAP, **ASC 606**, finance, accounting, budgeting/forecasting, and cost control principles. Strong understanding of Sarbanes-Oxley requirements and internal controls. Experience interacting with all levels of management. Practice with internal control/business process documentation, implementation, and testing. Ability to perform monthly financial statement variance analysis. Knowledge of key performance indicators.

Languages: English and Spanish

