

VITA/RESUMES for Discovery Educational Consultants LCC

Michael D. Wankier

Dr. Paul J. McCarty

MICHAEL D. WANKIER, CPA

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SUMMARY:

Current CPA licensed in the State of Utah. Experience with complex consolidations, including foreign operations while managing a finance and accounting department of up to 25 employees. Designed reporting processes and procedures for bank compliance and board governance. Responsible for cash management and long-term financing of operations, acquisitions, and real estate. Established and maintained accounting policies, including revenue recognition for multiple-element arrangements, deferred customer acquisition costs, intangible assets, and equity compensation. Rated an exceptional performer at KPMG, LLP and Arthur Andersen, LLP during more than seven years of public accounting experience. Leveraged public accounting experience to become Group Controller, Director of Finance, VP of Finance, and ultimately CFO.

EXPERIENCE:

LARRY H. MILLER MANAGEMENT CORPORATION

A regional conglomerate of family-owned businesses in automotive sales and service, auto finance, auto ancillary products, movie theater exhibition, professional sports, real estate management, and other related businesses.

Sandy, Utah

FINANCE SPECIAL PROJECTS	AUG-21 to DEC-21
CHIEF FINANCIAL OFFICER	MAY-16 to AUG-21
VP OF FINANCE	APR-15 to MAY-16
DIRECTOR OF FINANCIAL REPORTING	JUL-12 to APR-15

I started with the Larry H. Miller Group as the Director of Financial Reporting, developed into VP of Finance and was later promoted to Chief Financial Officer (May 2016). Managed accounting, reporting, tax, treasury, and payroll. Report quarterly to the board of directors and audit committee and coordinate annual review meetings with banking partners.

Primary responsibilities include:

- Oversee consolidation of multiple reporting entities including elimination entries
- Review calculation and reporting for debt covenant compliance
- Oversee creation of financial statements for quarterly and annual reporting
- Coordinate external audit with KPMG and resolution of audit issues with Partner and Manager
- Oversee coordination of Federal and State tax return filings
- Coordinate documentation and analysis of technical accounting policies
- Supervise reporting, tax, payroll, and internal audit functions
- Manage group-wide cash flow forecasting and capital allocation

Accomplishments:

- Assisted in the process of selling majority interest in the Utah Jazz
- Obtained financing for Vivint SmartHome Arena remodel
- Coordinated financing for multiple automotive dealership acquisitions
- Developed format and process for board reporting
- Implemented One Stream system for consolidation of disparate entities and data sources
- Coordinated data warehouse development and data analysis processes for management company

PINNACLE SECURITY, LLC and DEVCON INTERNATIONAL CORPORATION

A national provider of security sales and servicing, specializing in residential security monitoring services. Owned by a similar private equity parent, Pinnacle and Devcon combine to form a nearly \$200M nationwide security sales and monitoring presence.

Orem, Utah

GROUP CONTROLLER	FEB-09 to JUL-12
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Managed accounting department for multi-tiered consolidated group with 3 direct reports and total staff of 25. Ensured timely completion of annual audit and reporting to banks for debt compliance. Coordinated completion of tax returns with third-party preparer.

Primary responsibilities included:

- Consolidation of multiple reporting entities, including Canadian operations
- Translation of balances for foreign subsidiary

- Compilation of financial reports for Board and monthly bank compliance reporting
- Coordination of external audit and tax filings with third-party service providers
- Supervision of internal audit function and process improvement

Accomplishments:

- Develop and analyzed multiple-element revenue arrangements
- Consolidated/merged the accounting for multiple subsidiaries into a single department
- Coordinate with divisional office in Florida through quasi-merger of two organizations
- Improved close cycle from 30 days to 15 days
- Implemented new billing and customer management system
- Implemented process for filing sales/use tax with third-party processor
- Developed basic understanding of SQL Server as used with Microsoft Dynamics (Great Plains)

KPMG, LLP

Salt Lake City, Utah

AUDIT SENIOR MANAGER	SEP-08 to JAN-09
AUDIT MANAGER	SEP-06 to SEP-08
AUDIT SENIOR	SEP-03 to SEP-06
AUDIT ASSOCIATE	MAY-02 to SEP-03

Evaluated as Exceptional Performer by supervisors during multiple annual evaluations. Managed and supervised various engagement teams. Planned & performed audit procedures related to annual audits and quarterly reviews, including compliance with internal controls requirements, for the following public and non-public clients:

- Altiris, Inc.
- Franklin Covey Company
- H&E Equipment Services, LLC
- Nature’s Sunshine Products, Inc.
- SCO Group (Caldera International, Inc.)
- Maverik, Inc.
- ProModel, Inc.
- Burton Group, Inc.

Accomplishments:

- Audited software revenue recognition policy and calculations for Altiris, Inc. for four years on audit
- Coordinated multiple-site audits for Altiris, Inc. and Franklin Covey Co., including audit locations in England, Japan, Mexico
- Reviewed and provided comment on preparation of SEC Filings, including Forms 10-K, 10-Q, S-1, S-4, 8-K, filed Franklin Covey Co., H&E Equipment Services, LLC, and Nature’s Sunshine Products, Inc.
- Audited the implementation and continued compliance with Sarbanes Oxley Act (SOX) by Altiris, Inc. and Franklin Covey Co.
- Rated an exceptional performer in each annual performance evaluation

ARTHUR ANDERSEN, LLP

Salt Lake City, Utah

AUDIT ASSOCIATE	AUG-01 to MAY-02
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Evaluated to have met the expectations of supervisors on all assignments at Andersen. Performed testing procedures related to annual audits and quarterly reviews for the following clients:

- Nature’s Sunshine Products, Inc.
- Iomega Corporation
- ICM Equipment Company, LLC (now H&E)
- TTM Technologies, Inc.
- Cookietree Bakeries, Inc.
- Wasatch Property Management
- Bear Creek Country Kitchens, LLC
- Achieve Global
- Sandstar Family Entertainment

EDUCATION: SOUTHERN UTAH UNIVERSITY, CEDAR CITY, UTAH.
 Masters of Accountancy, May-2001
 Bachelors of Science - Accounting, May-2000

REFERENCES: Available upon request.

Paul J. McCarty EdD

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Career Summary

Dr. McCarty served 40 years in the Granite School District as a public-school principal and district office administrator. He has an undergraduate degree from the University of California at Berkeley. His Masters and Doctorate were earned from Brigham Young University. He taught over 30 years at Brigham Young University in the Departments of Education, Family Life and Psychology as an adjunct professor. Paul served as the Utah Transit Authority (UTA) Board Director of Light Rail Development & Construction and Vice President of the UTA Board of Directors prior to the 2002 Winter Olympics in Salt Lake City. Among his UTA responsibilities was the research and development of viability and feasibility studies which included the Light Rail/TRAX Final Environmental Impact Study and the UTA Preliminary Engineering for Light Rail/TRAX Construction Reports. He also spent three years as the UTA Board Director responsible for Internal Audits and transportation feasibility studies.

Dr. McCarty has been involved in multiple public school evaluative studies researching and organizing data and criteria needed to determine the type and quality of educational necessities required to meet the Granite School District's future needs. The primary goal of the feasibility studies was to help the Granite School District understand what it has in terms of school facilities and what is needed to satisfy anticipated changes in future capacity needs and educational programs.

Dr. McCarty was elected as members of the Draper City Council and Canyons School Board. He was involved in the 2007 creation of a new school district in Utah, and the 2008 development and organization of the Canyons School District. Among honors and recognitions received include the Jon & Karen Huntsman Award for Excellence in Education, Granite School District Principal of the Year, Utah Principal of the Year, United States Air Force (USAF) Distinguished Civic Leader of Utah, Honored Utah Public School Administrator and Principal Recognition – Utah House & Senate Joint Resolution 23; National Instructional Technology Leader – The Smithsonian Institute, Washington DC.

EDUCATION

- 1986 **Postdoctoral Studies**, Utah State University, Logan, UT. Education Administration. Administrative/Supervisory credentials earned.
- 1983 **Doctor of Education**, Brigham Young University, Provo, UT. Major in Educational Psychology with emphasis in Special Education, Language Development and Assessment. Dissertation: “A Study of the Southern California Sensory Integration Test (SCSIT) as a Tool for Identifying Neurophysiological Dysfunctions in Learning Disabled Children.”
- 1978 **Master of Education**, Brigham Young University, Provo, UT. Counseling Psychology and Guidance.
- 1972 **Postgraduate Studies**, St. Mary’s College, Moraga, CA. Earned secondary and elementary teaching credentials; graduated summa cum laude.
- 1971 **Bachelor of Arts**, University of California, Berkeley, CA. History and Political Science

PROFESSIONAL WORK EXPERIENCE

- 2021-present **Managing Principal, Discovery Educational Consultants LLC**, Utah. Systematic investigation team that applies empirical methods to solving challenges in education. Discovery utilizes rigorous and well-defined scientific processes to gather and analyze data to problem-solve and develop successful strategies for improvement and growth.
- 2018-present **Chief Executive Officer (CEO)**, Torus Global Industries, Salt Lake City UT. International humanitarian programs. These International Arts & Media University (IAMU); trauma & aftercare treatment facilities for children and adults; security and investigative services for both business and residential needs.
- 2009-2018 **Principal**, John C. Fremont Elementary, Granite School District, Salt Lake City, UT. Title One Student multi-diverse K-6 population with 29 languages and 50+ cultures. Also supervised Granite School District’s Autism Spectrum Disorder self-contained units; and established and supervised student intern program between Granite and Brigham Young University – Idaho (BYU-I). Created the first public school and community-based partnership with YMCA, resulting in the construction and operation of YMCA Family & Neighborhood Center building built on school campus. Co-developed with Stephen R. Covey 7 Habits student leadership program for elementary school-age children called *Leader in Me*.
- 1982-2018 **Adjunct Professor, Brigham Young University**, Provo, UT. Dual teaching assignment with School of Family Life and Department of Psychology. Taught advanced issues in public education, human development, marriage and family counseling, neuropsychology (sensation & perception), environmental psychology, adolescent psychology, and abnormal psychology. Taught educational leadership and supervised teacher interns at the McKay School of Education, 1982-1993.
- 2010-2012 **Founder and Chief Operations Officer, Veterans Technology Institute**, Orlando, FL. In conjunction with The Wounded Warriors Project & Stetson University (Florida); helping veterans receive advanced technical certifications, internships and job placement.
- 2005-2009 **Administrator, Educational Equity**, Granite School District, Salt Lake City, UT. Responsibilities included: Educational Equity; English Language Learners (ELL); family literacy; major grants and funding; intergovernmental affairs; district legislative liaison with the Utah State Legislature and Utah State Office of Education (USOE), 504 compliance, Title III, Community Learning Centers, Refugee and Newcomer social and literacy programs. As a public education representative at the Utah State Legislature, I was responsible for the passage of multiple education funding bills. In 2007 wrote and assisted in the passage of \$60Million for Utah’s state-wide *21st Century Classroom Technology*; in 2008 wrote and assisted in the passage of \$8Million for *English Language Learner Family Literacy*.
- 2007-2009 **Director, Family Literacy**, Granite School District, Salt Lake City, UT. Supervised English as a Secondary Language (ESL) family literacy and educational resource services for Granite School District ESL, refugee and newcomer students and families. Wrote

successful grants for: 1) \$1Million - U.S. Dept. Health Human Resources – Office of Refugee Relocation - ‘Linking Incoming Families to Educational Resources, Activities, Facilities, and Training (LIFERAFT); 2) \$1Million - National Center for Family Literacy. Created and implemented distance learning partnership with Granite School District, Mexico’s Tecnologico de Monterrey, Utah State University, USOE and the Mexican Consulate in Salt Lake City. Helped in developing online academic programs, in Spanish, for Utah general education degree (GED). Granite was one of the first international sites in the country to host distance learning/online programs originating from the Tecnologico de Monterrey (Mexico) for Spanish speaking adults in Utah.

- 2007-2009 **Member, U.S. Congressional Reform and Reauthorization Committee for *No Child Left Behind*.** Educational representative for U.S. Congressman Chris Cannon (R) Utah.
- 2005 **Visiting Lecturer, School of Professional Studies in Business and Education, Johns Hopkins University,** Baltimore, Maryland
- 2002-2006 **Member, U.S. Department of Education Task Force for the Development of the National Education Technology Plan.** Assisted in the development of the National Instructional Technology Strategic Plan for the US Department of Education.
- 1989-1993 **Utah Transit Authority (UTA) Board Director of Light Rail Development & Construction and Vice President of the UTA Board of Directors,** Salt Lake City, Utah. UTA responsibilities included supervising the research and development of viability and transportation feasibility studies. These included the UTA’s Light Rail/TRAX Final Environmental Impact Study and the UTA Preliminary Engineering for Light Rail/TRAX Construction Reports. He also spent three years as the UTA Board Director responsible for Internal Audits and transportation feasibility studies.
- 1987-2005 **Principal, Granite School District,** Salt Lake City, UT. While principal of During my 18 years as an elementary school principal at primarily Title One schools, my students achieved 10% yearly academic test scores gains and our English Language Learners making academic gains up to 16% as measured by Utah’s Criterion Reference Tests (*Educational Facility Planner* October 2004). Closing the achievement gap with improved student achievement tests scores and teacher instruction has earned multiple awards and recognitions that have included Granite School District being named as a National Center for Family Literacy, the Jon and Karen Huntsman Award for Education Excellence, the National Smithsonian Institute’s Instructional Technology Award, Utah Principal of the Year.
- 1986- 1987 **Secondary School Counselor/Middle School Administrator,** Churchill Jr. High School, Granite School District, Salt Lake City, UT.
- 1985-1986 **High School Assistant Principal,** Granite High School, Granite School District, South Salt Lake City, UT.
- 1984-1994 **Family Therapy & Counseling,** Wasatch Family Counseling Clinic, Salt Lake City, UT.

- 1978-1985 **District Psychologist and Special Education Evaluator**, Special Needs Evaluator and Learning Specialist, Granite School District, Salt Lake City, UT.
- 1974-1975 **High School Teacher**, San Ramon School District, Danville, CA. Taught physical education and 11th grade history at San Ramon High School
- 1971-1975 **Elementary School Teacher**, San Ramon School District, Danville, CA. 5th & 6th grades

PROFESSIONAL AWARDS/RECOGNITION

- 2012 **Outstanding Service Award** – Serving on Canyons School District First Board of Education 2008-2012. Responsible for design & construction of two new schools – Corner Canyon High School & Draper Park Middle School.
- 1999 **James E. West Fellow** – BSA National Endowment Award for Service
- 1993 **Jon & Karen Huntsman Award for Excellence in Education** – first recipient of the Outstanding Principal (public school administrator) award.
- 1993 **Honored Utah Public School Administrator and Principal Recognition** – Concurrent Resolution HCR2, Utah Legislature and Governor Michael Leavitt, 1993 General Session.
- 1993 **UTA Outstanding Service Award** – UTA Board of Directors in charge of TRAX
- 1993 **United States Air Force Distinguished Civic Leader** - Recipient of the U.S. Air Force' Distinguished Civil Leadership Award. Honored by Major General Charles A. Horner (CINC NORAD), for non-military role in Operations Desert Shield and Desert Storm with 388th & 419th Fighter Wings. Distinguished VIP Tour of multiple national Air Force Installations including United States Air Force Academy, Hill AFB, Mountain Home AFB, Peterson AFB, North American Aerospace Defense Command (NORAD), United States Northern Command (USNORTHCOM) headquarters, and Air Force Space Command Headquarters, Cheyenne Mountain AFB, and Falcon AFB.
- 1990 **Distinguished Principal Award of Utah** – Utah Association of Elementary School Principals (UAESP)
- 1990 **Honored Utah Public School Administrator and Principal Recognition** – House Joint Resolution 23, Utah Legislature and the Governor Norm Bangeter, 1990 General Session.
- 1990 **National Instructional Technology Leader Award** – Smithsonian Institute, Washington
- 1989 **Innovator of the Year** – Utah Association of Elementary School Principals

COMMUNITY SERVICE

- 2011-2018 **Education Advisory Committee** (Pathway Program) for the Church of Jesus Christ of Latter-Day Saints and Brigham Young University at Idaho
- 2007-2018 **Offender Re-Entry Transition Director for Utah Department of Corrections at the Utah State & Gunnison’s Prisons.** Responsible for felon transition counseling from prison back into society. Also work in prison family history program as a volunteer with the Church of Jesus Christ of Latter-day Saints.
- 2008-2012 **Canyons School Board Member** (elected), Sandy, Utah. Created, organized and operated a newly created school district of 33,000 students. First school district created in Utah in over 100 years.
- 2006 **Volunteer Archeologist at Jamestown, Virginia (Association for the Preservation of Virginia Antiquities – APVA)** - APVA began an archaeological project called Jamestown Rediscovery to find the remains of the original James Fort, ca. 1607-1624. Years of exploration have established the location of the fort and principal buildings and recovered more than three million artifacts. The project has rewritten our understanding of early settlers' daily life and purpose and their relations with Native peoples.
- 1997-2012 **BSA Endowment Grant Writer and Executive Council Member** – Boy Scouts of America, Great Salt Lake Council, Utah
- 1998-2002 **City Councilman** (elected) – Draper City Council, Utah
- 1998-2002 **Committee Member**, Parents Advisory Committee, Crescent View Middle School, Jordan School District
- 1988-1992 **Vice-President, Utah Transit Authority (UTA) Board of Directors** – In preparation for the 2002 Winter Olympics served as Director of Light Rail (TRAX)
- 1989-1992 **Vice President, Utah Governor’s Commission on Utah & Soviet Union Relations**

PROFESSIONAL PUBLICATIONS

Books Published

An Uncommon, Common Pioneer – The Journal of James Henry Martineau, 1828 - 1918. Religious Studies Center, Brigham Young University. August 2008. Chaired, researched, and supervised this James Henry Martineau Journal Publication Project with editors, Donald Godfrey and Rebecca S. Martineau-McCarty.

Chapters in Books

Martel, Laurence, & McCarty, Paul J. (2003). The Seven Secrets of Learning Revealed. Elements in the Ergonomics of Learning – Environmental Hazards, National Academy of Integrative Learning, South Carolina

Journal Articles

- McCarty, Paul J. (2021). “Installing Fiber Optic Lighting”. Model Railroader Magazine. Kalmbach Media, Waukesha, Wisconsin. January 2021.
- McCarty, Paul J. (2008). “On-going Research on English Language Learner Interactive Tutorial Software and Its Impact on Student Achievement”, White Paper presented to the National Family Literacy Conference, National Center for Family Literacy, Louisville, Kentucky
- McCarty, Paul J. & Ribera, John (2005). “Sound Ideas for Better Learning”. Journal for College Planning and Management. Dayton, Ohio, October, 2005.
- McCarty, Paul J. (2004). “Saving Teacher’s Voices”. Principal. National Association of Elementary School Principals. Alexandria, Virginia. December, 2004.
- McCarty, Paul J. and Rosen, Larry (2005). “Acoustical Design: Basis of a Sound Education”. School Planning & Management. Dayton, Ohio, April, 2005.
- McCarty, Paul J. & Gertel, Steve (2005). “High Performance Schools Equals High Performing Students”. Educational Facility Planner. Council of Educational Facility Planners International. Scottsdale, Arizona. Vol. 39-2, October, 2004.
- McCarty, Paul J. (1995). “Four Days That Changed the World – The Educational Impact of Telecommunications”. Educational Leadership. Association of Supervision and Curriculum Development. Alexandria, Virginia. October, 1995.
- McCarty, Paul J. (1994). “Internet and the Information Highway”. The Leader. Utah Association of Elementary School Principals. November, 1994.
- McCarty, Paul J. (1991). “Bringing the World into the Classroom”. Principal. National Association of Elementary School Principals. Alexandria, Virginia. November, 1991.
- McCarty, Paul J. (1989). “Working on the Railroad – In School”. Principal. National Association of Elementary School Principals. Alexandria, Virginia. November 1989.
- McCarty, Paul J. (1989). “Learning Tracks in Utah”. Technological Horizons in Education Journal. Irvine, California. October, 1989.

PROFESSIONAL PRESENTATIONS

- McCarty, Paul J. (2008) “21st Century Classroom Technology and Its Impact on Student Achievement”, United Kingdom, France, and United States Educational Technology Leaders Conference, Hosted by Promethean, Atlanta, Georgia. September 2008.
- McCarty, Paul J. (2008). National Family Literacy Conference. Louisville, Kentucky. March, 2008. National Center for Family Literacy. “On-going Research on English Language Learner Interactive Tutorial Software and Its Impact on Student Achievement”

- McCarty, Paul J. (2006) International Society for Technology in Education, National Education Computer Conference (NECC). San Diego, California. July 5, 2006. “Improving Student Achievement in Technologically Enhanced Classrooms”.
- McCarty, Paul J. (2005) Johns Hopkins University, School of Professional Studies in Business and Education. Baltimore, Maryland. June 4, 2005. “Designing the Best Learning Environments to Maximize Student Performance”.
- McCarty, Paul J., Greiner, Ken & (2005) Urban Education Best Practices Conference. Nevada Association of School Administrators. “Washoe County Successful Student Achievement in Minority-Majority Title One Schools”. October, 2005
- McCarty, Paul J. (2005) Pacific Northwest Regional Conference of the Council of Educational Facility Planners. Edmonton, Alberta, Canada. July 9, 2005. “Designing the Best Learning Environments to Maximize Student Performance”.
- McCarty, Paul J. (2004) U.S. Department of Education Secretary’s No Child Left Behind Leadership Summit – “Empowering Accountability and Assessment Using Technology”. St. Louis, Missouri. March 11, 2004. “District and States Working Together to Discover the Best Learning Environment to Empower Accountability & Assessment to Maximize Teacher Performance and Student Achievement”.
- McCarty, Paul J. (2003) Florida Council on Elementary Education (FCEE) annual conference, "Speak to Us of Children." Orlando, Florida. September 26, 2003. “Enhancing Academic Success Among Orlando Urban Schools ”.
- McCarty, Paul J. (2001) Association Supervision Curriculum Development (ASCD). San Antonio, Texas. "Jump On English Program Ensures Literacy Success for ESL Students” March, 2001

PROFESSIONAL AFFILIATIONS

Association Supervision and Curriculum Development (ASCD)
Council of Educational Facility Planners International (CEFPI)
International Society for Technology in Education (ISTE)
National Association for Multicultural Education (NAME)
National Association of Elementary School Principals (NAESP)
National School Board Association (NSBA)
Teaching English to Speakers of Other Languages (TESOL)