

Patty Pickard
Partner



Select Executive Experience

401 Training LLC (2022-Present)
CFO and Partner

Salesmanship Club of Dallas (2013-2022)
CFO

National Math and Science Initiative (2007-2013)
CFO

YMCA of Metropolitan Dallas (2005-2007)
CFO

Coopers and Stebbins (2001-2005)
CFO

Howard Schwartz and Associates (1999-2001)
Consultant

Core Competencies

Financial Reporting
Analytics & Modeling
Forecasting
Internal Control Oversight
ERP Systems Conversions
Operational Management
Regulatory Compliance Management
Organizational Development
Executive Leadership
Change and Growth Management
Strategic Planning and Execution
Profit and Loss Management
Board Oversight
Budget Planning
Operational Analysis
Financial Administration
Risk Management
Process Improvement
Human Resources Oversight
Talent Recruitment

Executive Profile

Patty Pickard is a Partner on the Central team of SeatonHill. Ms. Pickard is a strategic CFO with over 40 years of experience leading financial planning and oversight in harmony with executives. She is a seasoned expert with a well-rounded background in effectively guiding various financial projects, focusing on implementing process flows that optimize talent and enhance the success of an organization. Patty has demonstrated strengths in forecasting, reporting, and leading initiatives to support executive decision-making. She has served as CFO and COO of several multi-million dollar companies, as Senior Vice President of a multi-billion dollar publicly traded company, as senior advisor/consultant in several mergers of private and public companies, and as CFO for multiple non-profit organizations.

Industry Experience

Finance
Real Estate Development
Oil & Gas
Insurance
Non-profit

Education & Certifications

Bachelor of Science in Accounting
Indiana University

Certified Public Accountant (CPA)



Our partners have deep experience across multiple industries, and can quickly integrate into your organization to provide the insights you need to succeed in today's marketplace.

Key Experience

Salesmanship Club of Dallas: As CFO, Patty executed the organization's strategic plan to combine the back room of 5 Salesmanship Companies. She created and implemented best practices to standardize internal processes and procedures that promoted a strong internal control structure. She identified and implemented ERP systems that centralized the individual entities into one organizational IT platform that included accounting, payroll and fundraising systems. She prepared financial forecasts to support fiscal planning and management. Patty supported company growth objectives by developing solid financial plans. Those improvement initiatives promoted profitability and efficiency throughout the organization.

Math and Science Education Non-profit: As CFO, Patty was tapped to join 5 C-level executives to start up an advanced placement math and science scalable initiative with a grant of over \$100 Million dollars given by a multi-billion dollar energy company. Patty devised strategies to drive organizational vision in concert with the Board of Directors and senior executives. She built and implemented all back room systems and hired and guided all back room staff. Patty also created and implemented best practices to standardize internal processes and procedures. She devised reporting structures for the original 8 nationwide locations with budgets of over \$13 Million per School District.

YMCA of Metropolitan Dallas: As CFO, Patty was brought on board to facilitate a tax exempt bond issue to supplement funding alongside of the impending capital campaign. She created and implemented best practices to standardize internal processes and procedures. Patty also managed company-wide budgets, payroll, accounting, and other financial operations. She prepared financial forecasts to support fiscal planning and management.

Real Estate Developer: As CFO, Patty was asked to join the company to organize the partnership financial information in preparation for the sale of the first three projects. She developed plans to standardize and facilitate organizational asset management. Patty also created and implemented best practices to standardize internal processes and procedures. She managed company-wide budgets, payroll, accounting, and other financial operations.

Financial Services Firm: Patty served as consultant for this financial services organization to assist in the preparation of financial data for audit as part of the sale to a multi-billion dollar public company. There were 13 locations in the US and Europe which required the ability to translate the international financials into US Dollars. Patty hired consulting accountants to assist in the facilitation of reconciliation of the 13 locations into the consolidated financials to package for sale. She also worked with the attorneys to complete the sale.

Insurance Corporation: Patty started as Division Assistant Controller and was promoted over the years eventually to Senior Vice President and Controller of the holding company. In 1999 the company was sold to a billion-dollar public insurance company. During the due diligence and closing Patty was retained to facilitate the move of the entire accounting department back under the umbrella of the new company.

Women's Foundation: This nonprofit organization had been through several months of C-level disruption with the CEO leaving abruptly and the CFO leaving quickly thereafter, and an interim CEO was brought in a few months before Patty began this engagement. Upon realizing the organization was in a cash deficit position with no sustainable unrestricted operating revenue coming in the foreseeable future, Patty determined the organization's cost structure and staffing had to be restructured. Leveraging a strategic approach to fiscal management, she implemented comprehensive cost-saving measures including staff reductions and renegotiated contracts, plus she helped develop new revenue streams. Through these efforts, the organization not only avoided insolvency but also achieved a cash-positive status, ensuring its long-term sustainability and ability to continue serving its mission. The organization's financial reporting system is Blackbaud which includes Financial Edge and Raiser's Edge modules.

Dallas Area Foundation: As Fractional CFO for this foundation, Patty is providing oversight and guidance to the Controller and accounting staff, including preparing the FY 2025 Budget, completing the annual external audit for FY 2024, and preparing the IRS Form 990. The organization's financial reporting system is QuickBooks Intuit.

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