

Katherine Westover, CPA
Westover Consulting LLC
Softspan, LLC

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SHORT BIO

Working on a project basis or as a part-time or interim CFO, Katherine (Kathy) Westover, CPA, has helped approximately 200 clients improve their accounting and organizational processes and address needs from crisis to opportunity. Frequently called when there is an issue related to ineffective tracking and reporting, suspect transactions, personnel challenges or business transitions, Kathy has been described as “the calm voice in the storm” with “the ability to execute the finest details while helping shape the big picture.” Kathy’s experience includes public accounting, private industry leadership, business ownership and board member for several organizations. Kathy is trusted to ask the right questions, assess business needs and provide direct, compassionate and hopeful feedback that inspires others to effect positive change. Kathy sees the role of the CFO as pivotal in the strategic success of any organization. She is a past winner of the Athena Award, recognizing the businesswoman of the year, and a recent winner of the Fox Cities Exceptional Mentor Award.

LONG BIO

Service Summary

Working on a project basis or as a part-time or interim CFO, Katherine (Kathy) Westover, CPA, has helped approximately 200 clients improve their accounting and organizational processes and address needs from crisis to opportunity. Frequently called when there is an issue related to ineffective tracking and reporting, suspect transactions, personnel challenges or business transitions, Kathy has been described as “the calm voice in the storm” with “the ability to execute the finest details while helping shape the big picture.” Kathy is trusted to ask the right questions, assess business needs and provide direct, compassionate and hopeful feedback that inspires others to effect positive change. Kathy sees the role of the CFO as pivotal in the strategic success of any organization.

Personal Attributes

A person of integrity with a visionary outlook and a focus on quality. An intelligent, creative and thoughtful person who handles change effectively and inspires others to get the job done.

Skills

- Strong communication and interpersonal skills.
- Effective leader who mentors others to learn new skills, reach higher and build confidence.
- Strong process and technology skills.
- Extensive accounting background and financial expertise.
- Adept at shaping big picture goals and accomplishing them by identifying project steps and implementing solutions.

Areas of Expertise

- Accounting and financial management.
- Process Improvement.
- Organizational re-alignment and strategy.
- Software knowledge and training.
- Problem solving and decision making.
- Communication and customer satisfaction.

Accounting Experience

Katherine Westover, CPA
President, SOFTSPAN, LLC. Appleton, WI.
President, Westover Consulting LLC, Appleton, WI.

CPA since 1981, Softspan formed in 1996 to provide technology-based accounting software and database solutions. Westover Consulting formed in 2012 to provide organizational and accounting consulting services to complement Softspan services.

Provider of project-based financial services, generally as a part-time or interim CFO, including:

- organizational and financial assessment,
- financial personnel assessment and team leadership,
- strategic planning, project identification and management,
- re-engineering financial processes and reporting,
- development and documentation of policies and procedures,
- development and monitoring of key metrics,
- accounting software usage and training,
- database design services,
- internal control review,
- communication with key constituents.

Have worked with approximately 200 clients, including financial institutions, manufacturers, R & D facilities, service providers and non-profit organizations.

Proficient in:

- Financial analysis and reporting.
- Process analysis and improvement.
- Leadership of accounting teams.
- Working as a liaison with client constituents and service providers.
- Developing policies and procedures.
- Implementing software solutions.
- Facilitating planning sessions.

Controller, Medix of Wisconsin, Inc., Madison, WI.

Former Chief Financial Officer (CFO) for medical supply distributor with 10 locations in 5 states. 150 employees. Annual sales approximately \$50 million. Supervised accounting department, information technology department and human resources department. Responsibilities included financial management, planning and reporting, process improvement, inventory control, cash flow management, banking, insurance and auditor relations.

Staff Accountant, Smith and Gesteland, Certified Public Accountants, Madison, WI.

Former auditor and tax accountant for regional CPA firm.

Additional Business Experience

Baileys on the Rocks Cottages, Baileys Harbor, WI.

Owner for 9 years of two vacation rental cottages in beautiful Door County. Responsibilities include all aspects of managing rental properties, including dealing with the unexpected.

Westover House, Neenah, WI.

Former owner of a retail store selling quality women's apparel. 15 employees. Responsible for all aspects of the business including customer relations, human resources, inventory control, store design, property management, accounting and marketing.

Skilled Mediation and Facilitation Services, LLC

Owner providing mediation and facilitation services to business

Education

University of Wisconsin system, Bachelor of Business Administration degree, Accounting major.
Magna Cum Laude graduate.

Neenah High School graduate, graduated in top 1 % of class.

Recognition and Certification

Certified Public Accountant - licensed in Wisconsin

One of the approximately 10 % nationally who pass the CPA exam on the first attempt.

Athena Award winner

National award presented by the local Chamber of Commerce recognizing the businesswoman of the year.

Exceptional Mentor Award winner

Annual award presented by the Fox Cities Chamber of Commerce

Community Involvement – Past and Present

Board of Directors

Community First Credit Union (Board Chair)

Community Foundation for the Fox Valley Region (Treasurer, Executive Committee, Audit Committee, Finance Chair)

Theda Clark Medical Center

Fox Cities Chamber of Commerce

Neenah Rotary (Past President)

YMCA

United Way

Advisory Boards

Associated Bank

International Paper

University of Wisconsin-Oshkosh School of Business

City of Neenah Vision 2020 Long-range planning committee/spokesperson

United Health Group Community Health Initiative

Volunteer Work

Hurricane Katrina Relief worker

Fox Cities Chamber of Commerce

Winnebago Conflict Resolution Center

First Presbyterian Church of Neenah

Best Friends of Neenah-Menasha

Neenah Rotary

Memberships

Wisconsin Institute of Certified Public Accountants (WICPA)

Rotary International

Fox Cities Chamber of Commerce