

DAVID E. ROSE, CPA, CCIM
COMMERCIAL ASSOCIATE

Experience

June 2020 – Present | **Commercial Associate**

Wheeler Commercial | Beaumont, TX

- Market and structure commercial deals for investors and small business owners
- Create innovative, tax savvy, exit strategies and acquisitions
- Educate clients on the benefits of IRS Section 1031 tax deferred exchanges
- Perform sale / leaseback analysis for business owners looking to increase working capital
- Advise property owners in repurposing, tenant mix and site selection
- Utilize accounting and finance background to maximize Net Operating Income (NOI) which drives property value

2008 – Present | **Commercial Associate**

Coldwell Banker Commercial, Ingle Safari | Lake Charles, LA

- Consistent multimillion-dollar producer
 - Clients often become close friends and repeat business
- Successfully leased or sold investment, industrial, retail and hospitality properties

2012 – Present | **Accounting and Real Estate Finance Instructor**

Lamar University | Beaumont, TX

- Work with the business community to align graduates' skills with employer needs
- Develop curriculum, assessments, and lectures for accounting and real estate courses
- Promote and sell the accounting program and profession to students
- Construct and deliver instructional activities in traditional and online platforms
- Advise students in degree selection and career progression
- Provide tutoring to students having trouble with course content

2009 – 2011 | **Business Analyst**

Boise, Inc. | DeRidder, LA

- Responsible for creating and running financial models to determine the NPV and IRR on larger capital projects ranging from \$45 million to \$120 million
- Tracked and reported out on capital projects' status and cash flow
- Provided financial analysis on operations including margin and cost optimization, cost reallocation and vendor negotiation support
- Prepared financial and operational packages to solicit economic assistance
- Determined the future and present value of all asset retirement obligations
- Responsible for property tax renditions and Tax Assessor relation
- Forecasted capital spending curves and calculated capitalized interest

1996 – 1999; 2002 - 2009 | **Controller**

Lake Charles Toyota | Lake Charles, LA

- Handled financial and operational issues arising from the acquisition of Lake Charles Toyota and the sale of Lake Charles Nissan and Lake Charles Kia

- Responsible for all treasury functions including cash management, maintaining banking relationships, anticipating funding requirements and managing credit facilities
- Developed and monitored internal controls to protect assets
- Managed administrative and accounting staff
- Worked with outside CPA and attorney on audits, valuations, and risk management
- Prepared and reviewed financial statements, budgets, and forecasts

1999 – 2002 | **Senior Financial Analyst**

US Unwired | Lake Charles, LA

- Performed due diligence and support in various mergers and acquisitions
- Compiled investor packages for CEO and CFO who successfully launched an IPO
- Developed, maintained and reported a \$500 million budget across 5 subsidiaries
- Performed return on investment, capital expenditure, operational, and lease versus buy analysis
- Created subsidiary business models and maintained parent company model
- Reported peer analysis for quarterly financial analysts' calls and investor conferences
- Calculated and organized key financial and operational metrics for senior executives
- Appointed by CFO to committee charged with providing financial solutions to operational issues

Education and Licenses

- McNeese State University, Master of Business Administration
- McNeese State University, B.S. Accounting / Minor: Speech and Public Relations
- State of Texas licensed Real Estate Agent
- State of Louisiana licensed Real Estate Agent
- Certified Public Accountant (CPA)
- Certified Commercial Investment Member (CCIM) – the “PhD” of commercial real estate
- Completion of numerous commercial real estate courses

Professional and Community Service

- Served on the Southwest Louisiana Board of REALTORS® Commercial Committee
- Served as on TXCPA Southeast Texas Board as Director, Secretary, Membership Committee Chair and currently as Vice President of Administration.
- Faculty Advisor to Beta Alpha Psi Honors Accounting Fraternity
- McNeese Business Alumni Chapter
- American Institute of Certified Public Accountants
- Society of Louisiana Certified Public Accountants
- Louisiana Licensed Notary Public
- Counselor and board member for Camp Pearl Ministries youth camp
- Served as Deacon, Elder, Treasurer and Sunday School teacher

Skills/Qualifications

- Creative marketing and presentation skills.
- Expert negotiator with over two decades of training and experience.
- Persistent problem solver.
- Represented corporate clients, private investors, owners and tenants since 2008.
- Provide the most in-depth financial and market analysis to corporate clients.