

**DR. OMAR RITTER, CPA, CEPA, CGMA, SPHR**

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PROFILE

Decorated U.S. Army combat veteran and Bronze Star Medal recipient, with academic credentials from West Point and Columbia Business School, and a Doctorate in Business Administration. Accomplished senior finance executive with a proven track record in CFO roles, FP&A, M&A, audit, technology finance, operations, and board leadership across Fortune 50, public-company, and entrepreneurial environments. Successfully managed a \$1.2 billion P&L, directed \$4.4 billion in technology expenditures, and led rigorous financial due diligence. Trusted advisor to business owners on strategies for growth, profitability, and exit readiness. Professional certifications include CPA, CEPA, CGMA, and SPHR.

FOCUSCFO, Charlotte, NC**EXPERIENCE****2024 - Present*****Franchise Owner; helping business owners realize sustainable business value***

- Increased regional revenue by 30% through business development and client acquisition.
- Provide CFO guidance on cash flow, forecasting, profitability, and owner decisions.
- Advise businesses across diverse industries, from construction to business services and legal practices.

WELLS FARGO, NYSE: WFC, Charlotte, NC**2021 - 2024*****Senior Vice President of Finance; managed \$2.4 billion of technology spend and allocations***

- Built an audit system to track technology spend across labor, equipment, and new investments.
- Managed \$300M technology investment portfolio supporting bank modernization priorities.
- Reduced technology expenses 15% while maintaining operational efficiency.

CONDUENT, NASDAQ: CNDT, New York, NY**2020 - 2021*****Chief Financial Officer for a \$ 1.2 billion P&L call center operation with 25K employees***

- Owned \$1B revenue P&L for 25K-employee call center operation.
- Delivered \$10M in savings through contract renegotiations and remote-work strategy.

JPMORGAN & CHASE, NYSE: JPM, New York, NY**2017 - 2020*****Head of Technology Finance and Operations, overseeing \$2.0 billion of technology spend and allocations***

- Managed \$200M technology budget for 1,200 employees and led executive business reviews.
- Delivered \$6M in savings through vendor renegotiations and strategic expense management

TIAA, New York, NY **2014 - 2017**

Director of FP&A responsible for consolidating financial metrics for the firm's \$1 trillion in assets

- Led annual and multi-year revenue, expense, headcount, and net-flow planning process.
- Developed senior management review materials and CFO/CEO financial approval process.
- Oversaw capital planning supporting SOX, capital, and risk-weighting requirements.

PRAXAIR, New York, NY **2009 - 2014**

Director of Financial Planning and Analysis and Mergers and Acquisitions for an \$8 billion company

- Led negotiations and financial due diligence for \$1.1B NuCo2 acquisition.
- Directed monthly and quarterly results and forecasting for \$1.7B business unit.

BANK OF AMERICA, NYSE: BAC, New York, NY **2006 - 2009**

Investment Banking Associate, Global Industrials Group

- Executed M&A and corporate finance transactions, including due diligence and valuation analysis.

US ARMY, West Point, NY **2000 - 2006**

Captain and Company Commander

- Awarded Bronze Star Medal and Valor Device for gallantry in combat in Baghdad, Iraq.

BOARD SERVICE

Current Boards

Chair and President, West Point Class of 2000 Board (2000–present)

Board Advisor, Maine Pointe (2025-present)

Board Member, North Carolina Veterans Business Association (2026–present)

Previous Boards

Board Member, Down Syndrome Association of Charlotte (2022–2025)

Advisory Board Member, Teach for America Charlotte (2022–2025)

EDUCATION & CERTIFICATIONS

Bachelor of Science, General Management, 2000,
United States Military Academy, West Point, NY

Master of Business Administration, Finance and Strategy, 2007,
Columbia Business School, New York, NY

Doctor of Business Administration, Finance, 2026,
Liberty University, Lynchburg, VA

Certified Public Accountant (CPA)

Certified Exit Planning Advisor (CEPA)

Senior Professional in Human Resources (SPHR)

Chartered Global Management Accountant (CGMA)