

**TIMOTHY J. OKRIE, CPA**  
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**Finance, Accounting, Strategy and Operations Executive**  
**Professional and Financial Services Sectors**

Former Big 4 Partner and an \$2B public company Chief Operating Officer (COO) with experience successfully driving strategy execution, operations and change management/transformation. Extensive background of leading numerous teams, developing talent strategies and tactics to lead up to 100 people on Advisory and Assurance Engagements in domestic and international markets. Additionally, held a variety of leadership roles including Marketplace Leader, Senior Insurance Industry Sector Advisor and Strategist, and Internal Audit Services Leader. Those businesses included revenues of \$200M, a team of 75 Partners, Principals and Managing Directors and more than 500 employees. For each business area, developed strategic plans and operating models and had responsibility for P&L, talent strategies, technology, marketing, training and operational change management/transformation.

**CORE COMPETENCIES**

- ◆ Business Acquisition & Post-Merger Integration
- ◆ Organic, Non-Organic Revenue & Margin Growth
- ◆ Marketplace & Product Development
- ◆ Talent Acquisition, Development & Metric Management
- ◆ Data Management Development (Strategy & KPIs)
- ◆ External, Internal Auditing
- ◆ Financial Planning Analysis & Forecasting
- ◆ Internal Controls Over Financial Reporting
- ◆ Corporate Development & Business Innovation
- ◆ Operation Change & Business Transformation
- ◆ Turnaround Strategy & Initiatives
- ◆ Cross & Multi-Functional Team Leadership
- ◆ Customer Relationship Management
- ◆ Public Company Financial Reporting (SEC)
- ◆ Sarbanes-Oxley & Regulatory Compliance
- ◆ Risk Management, Governance & Oversight

**EDUCATION & CREDENTIALS**

**Bachelor of Science (BS) – Accountancy, '96**, DePaul University, Chicago, Illinois  
**Certified Public Accountant (CPA) (Licensed since '01)**, Illinois State Board of Accountancy

**PROFESSIONAL EXPERIENCE**

**BKD CPAs & Advisors – Chicago, IL** **2019 to Current**

BKD, LLP is a top-tier national CPA and advisory firm in business for 90+ years with more than 4,000 professionals across approximately 38 offices helping people and businesses realize their goals. We combine the insights and ideas of multiple disciplines to provide solutions. Offering a variety of services including consulting, BKD strives to be the Trusted Advisor. Our specialties include Audit & Assurance Services, Consulting Services, Corporate Finance Services, Forensics & Valuation Services, IT Risk Services, Tax Services, Technology Services, Wealth Advisory Services, International Services, Transaction Services and Employee Benefit Plan Services to clients in all 50 states and internationally across a wide range of industries.

**Managing Director**

Managing Director at BKD based in Chicago and serving a wide-range of clients across multiple industries. Having more than 30+ years of experience providing audit and business advisory services to public, private and non-for-profit entities. Specializing in Enterprise Risk Solutions and has responsibilities for client relationship development, delivering unmatched client service and solutions. Focused on executing talent strategies to attract, hire, coach and develop junior-level BKD professionals.

**Accume Partners – Chicago, IL** **2018 to 2019**

Private Equity (PE) owned US based Professional Services and Management Consulting firm providing Risk, Regulatory, Advisory, Information Technology Audit and Cyber Security Assessments and Consulting to clients.

**Managing Director**

Full leadership and oversight for the South region of Accume Partners which includes eleven states located throughout the Southern region of the country. Responsibilities include development and execution of the South region “Go-to-Market” strategy including alignment with the overall Accume National Growth Strategy. Areas of focus include client targeting, acquisition, relationship management, business development, ownership of South region financials. South region client portfolio primarily consists of 180+ Community, Regional Banks and Credit Unions., with the primary services being Risk, Regulatory, Advisory, Information Technology Audit and Cyber Security Assessments and

Consulting engagements. Responsible for talent acquisition, development and retention of professionals, driving growth outside of primary services and geography footprint.

**Stewart Information Services Corporation (NYSE: STC) – Houston, TX** **2016 to 2017**

Global real estate services and title insurance company providing residential and commercial title insurance, closing and settlement services to residential and commercial real estate transactions as well as specialized offerings for the mortgage industry and real estate transactions.

**Chief Operating Officer**

Recruited by the CEO, Chairman of the Board to perform a strategic turn-around of the Company that senior executives were not ready for and wholly opposed to executing. Additional Board members gained control of the Board and forced the sale of the Company to a competitor. Provided critical strategic and operational leadership across all core business units to meet aggressive financial and business performance goals of new activist investors. Scope of leadership and decision-making responsibility spanned \$2.2B in revenue, 6,000+ employees, 2,800+ agents, 425+ offices with operations in the US, UK, Canada, Australia and included business strategy, planning and execution, innovation, operations, sales, marketing, operational change management/transformation, customer relationship management tool development and deployment, execution of mergers and acquisitions, divestitures, business intelligence KPIs, and operational excellence.

**Deloitte & Touche LLP – Chicago, IL (Admitted to Partnership in 2005)** **1997 to 2016**

World's largest global professional services and public accounting firm with approximately \$18.4B in US based revenues and 84,000 employees.

**Partner / Client Relationship Leader (2012 to 2016)**

Risk Advisory Partner in business which had approximately \$2.6B in US based revenues and 11,000 employees. Advanced rapidly from Consultant to Partner within eight years of being hired. Additionally, developed and expanded relationships and led diverse teams delivering Advisory services to multiple global companies across various industry sectors including: Technology, Insurance and Asset/Investment Management, Telecommunications, Professional Services and Retail.

**Financial Performance**

- Delivered \$15M+ in recurring annual revenue at clients new to Deloitte.
- At one of those clients, generated revenue in excess of \$4M+ in year one by demonstrating financial viability of internal audit outsourcing and risk management program to a major financial services firm.

**Market Positioning & Growth**

- Established new and emerging market opportunities as well as initiated and grew client relationships at companies previously not served. This included assisting the South Africa Member Firm in the Insurance marketplace on a \$5M USD opportunity.

**Talent Leadership & International Business Operations**

- Leveraged expertise of global partners and leadership teams in Advisory, Assurance, Tax, and Consulting to effectively manage complex and diverse client engagements with the UK, Hong Kong, India, Amsterdam, Germany, Switzerland and South Africa.
- Developed and executed Talent management strategies to create sense of teaming and one-firm culture across continents to accelerate achievement of client goals and expectations

**Internal Audit Services Leader (2011 to 2013)**

Chief Operating Officer of the national Internal Audit Services business which included 12 offices, with 50 Partner, Principals, Managing Directors with \$125M in annual revenues and 440 employees.

**Financial Performance**

- Led Internal Audit business operational change and transformation from lowest performing margin Advisory business to #3 position in one year.
- Drove increased revenue of 15% in year one in a previously zero growth business.
- Won \$30M of net new client revenue, including the addition of three of the top five Internal Audit clients of the Firm.
- Increased integrated India offshore hours to 30% of total internal audit service hours across the entire Internal Audit client portfolio.
- Increased average gross margins 10% to 20% across the entire Internal Audit client portfolio.

**Strategy & Business Planning**

- Factors contributing to the success above included:
  - Established target of \$250K minimum revenue and margin hurdles of 40% for accepting new clients, ensuring sustainable profitability.
  - Established target India off-shore delivery integration of 40%.
  - Developed detailed go-to-market strategy, goals, objectives and operating plan.
  - Facilitated buy in from Internal Audit employees by constantly communicating through change management.
  - Drove sense of accountability for practice financial performance revenue and margin growth goals and objectives and achieving individual client targets through individual coaching, mentoring and fostering collaboration and teaming.
  - Visited all offices delivering Internal Audit services to evangelize the need for change and monitor progress on key metrics.
  - Changed and upgraded the leadership team to ensure execution of the key changes initiatives.
  - Created centers of excellence around market offerings and financial targets.
  - Drove all aspects of operational change management to support innovation and change management targets and expectations.
  - Developed and implemented Talent strategies to align resources to achieve business plans and expectations.
  - Developed key data management elements to enable use of KPIs to effectively lead and manage business.

**Technology & Business Innovation**

- Established implemented use Customer Relationship Management system to manage client portfolio and pipeline.
- Built customized industry specific Internal Audit capabilities and services creating marketplace differentiation and increased client value.
- Developed Internal Audit technology and tools that utilized internal and external data to deliver risk assessments, audit programs and reporting templates.

**Senior Insurance Industry Sector Advisor and Strategist (2010 to 2011)**

Acted as Senior Insurance Industry Sector Advisor and Strategist at the request of firm Advisory CEO & Board. Insurance sector portfolio consisted of approximately 60 clients with approximately \$40M in annual revenues, served via eight practice offices with by over 100 firm employees including 12 Partners, Principals, and Managing Directors.

**Risk Advisory Marketplace Leader (2008 to 2010)**

Regional Managing Partner responsible for leading Risk Advisory business with approximately \$150M in annual revenues, 250 clients, and five offices with 350 employees including 30 Partners, Principals and Managing Directors.

**Financial Performance**

- Increased client portfolio revenues 20% and margins 15%.
- Served as member of Midwest region operating committee to drive collaboration and integration among businesses to increase overall client revenues

**Strategy & Business Planning**

- Hand-picked by CEO to part of inaugural Advisory Partner Leadership Team.
- That leadership team developed the mission, vision, strategy, and operating model for the reorganization of the business leading to growth from \$800M in 2008 to more than \$2B in annual revenue in 2016.

**Business Change & Transformation**

- Led region through a successful operational change management/transformation from a decentralized to a centralized model that included structured business areas, regions, and industries as part of Deloitte-wide reorganization to optimize client services, increase client footprint, improve client service satisfaction, and grow client revenue and profit margins.

**Talent Acquisition & Development**

- Added 15 new Partners, Principals and Managing Directors to Midwest region via promotion or direct admission in order to meet marketplace demand.