
David M. Myers, Client Relationship Executive, CPA, MBA

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CLIENT RELATIONSHIP EXECUTIVE, FINANCE and FP&A LEADER

Supervisory Committee Board Member, Client Relationship Executive, and Financial Planning and Analysis (FP&A) Executive with broad based business and operational experience with public companies, Credit Unions, and not for profit (church) institutions serving in officer, senior management, and other leadership roles. Proven business-savvy, strategic, and employee mentorship executive having an extensive range of leadership skills plus adept at managing global/matrix teams, along with P&L ownership, budgets, forecasting, contract negotiation and administration experience, which includes driving value, revenue growth and supporting sales teams in closing new logos / new business pursuits. Unique ability to leverage financial and business acumen to assist C-levels in capitalizing on the unique abilities of the organization to develop client value propositions, plus have extensive experience in developing business cases and pricing strategies. Core competencies include:

- Advising Board of Directors and C-Levels • Managing Client Relationships • Strategic Planning • Financial Management
- Operational Reporting • Pricing and Business Case Development • Controllarship Functions, Budgeting and P&L Leadership

EXPERIENCE

Cinfed Credit Union (Cincinnati, OH) - **Board Member, Supervisory Committee** **2022 -- Present**

Responsible for overseeing the policies, procedures, and practices of a \$750M credit union to ensure adherence to regulations and legislation, including financial reporting practices and procedures to safeguard members' assets, and that the boards and management's strategies, plans and policies are reasonable in validating the safety and soundness of the credit union.

AllsourcePPS (Huntington Beach, CA) **2024 – 2025**

Consultant - Led strategic client engagement for FIS Global's largest Managed IT client, serving as the primary liaison between executive leadership, technical teams, and client stakeholders. Delivered high-touch relationship management, operational oversight, and issue resolution across complex IT service environments.

FIS Global (Jacksonville, FL) **2012 – 2022**

Vice President – Line of Business and Client Executive, Managed Solutions/Global Commercial Services

Client Executive responsible for driving customer relationships for a large portfolio of clients ranging from Large Regional Banks > \$10B in assets, community banks, financial services companies, Network/Circuit resale clients, Mainframe Clients, Gaming, Insurance, Telecom, Retail, Media, and Investment Banking clients.

NETCRACKER (formerly Convergys Information Management Group, a division of Concentrix) (Cincinnati, OH)

Vice President – Client, Program Management and FP&A Executive

2007 – 2012

Officer, Financial Controller, and Client Executive responsible for the P&L, budgeting, forecasting and overall customer relationships with AT&T, Duke Energy, and 20 + other Tier 2 telecom clients in North America.

ADDITIONAL EXPERIENCE

- **NETCRACKER** (Cincinnati, OH) – **FP&A Director, Program & Client Management Director (1997 – 2007)**
- **CINCINNATI BELL, INC.** (Cincinnati, OH) - **Senior Corporate FP&A Manager; Senior Internal Auditor (1990 – 1997)**
- **GE Aircraft Engines – Defense Contract Audit Agency, a U.S. DoD Agency Under the Secretary of Defense - Supervisory Auditor, Senior Auditor, Staff Auditor (1985 – 1990)**

EDUCATION / AFFILIATIONS / COMMUNITY INVOLVEMENT

Certified Public Accountant (CPA) – State of Ohio

Master of Business Administration (MBA) - Xavier University (Cincinnati, Ohio)

Bachelor of Science (BS): Accounting University of Kentucky (Lexington, Kentucky)

Treasurer & Chairperson, Finance Committee – Christ Baptist Church

Coach/Mentor – children's and high school student/athletic sports programs