



**WILLIAM LEVAN BYRD, CPA, PC**

CERTIFIED PUBLIC ACCOUNTANT

INCOME TAX CONSULTANTS

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November 18, 2014

The Honorable Governor Nikki R. Haley  
Office of the Governor  
1205 Pendleton, St.  
Columbia, SC 29201

Dear Governor Haley;

Congratulations on your re-election as Governor of South Carolina. Continue to represent us well. I would like to offer my service to appointment of any board or commission you deem appropriate.

Enclosed is a copy of my resume. As a recent graduate of the South Carolina Economic Development Institute, I am energized and excited about the possibility of service to my state.

Thank you for your consideration.

Sincerely,

William Levan Byrd, CPA, CMA, CGMA, MBA

## **WILLIAM LEVAN BYRD, CPA, CMA, CGMA**

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Sumter, South Carolina 29151-1431

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**Finance Executive** with in-depth strategic planning experience, providing management with critical value-added decision support for business solutions. Use strong financial background (CPA, CMA) to develop cost effective business solutions that favorably impact the bottom-line. Track record of team building and leading cross-functional teams. **MBA.** Expertise includes:

- Financial/Managerial Accounting
- Outsourcing/Process Reengineering
- Budgeting/Auditing
- Strategic Planning
- Activity Based Costing
- TQM/Benchmarking
- Financial Planning/Analysis
- Modeling/Forecasting

### **PROFESSIONAL EXPERIENCE**

**WILLIAM LEVAN BYRD, CPA, PC, Sumter, SC**

**1999-Present**

*Provide cross-functional consulting services to individuals, small businesses and not-for-profit organizations.*

#### **Sole Practitioner**

Led entrepreneurial development of practice, building start-up to over 300 clients. Staff of five.

- Design and conduct strategic/business planning seminars for clients.
- Conduct GAAP and GAAS audits.
- Prepare tax returns for individuals, Partnerships and C & S corporations.

**AXA/EQUITABLE, Columbia, SC**

**2000-2002**

*Provided financial planning and investment/risk management advice to high net-worth clients. Recognized as top producer in South Carolina for financial plans execution.*

**PHILIP MORRIS, INC., New York, NY**

**1986-1999**

*Philip Morris U.S.A. (PMUSA) is a \$15 billion cigarette manufacturing subsidiary of Philip Morris Companies, Inc. PMUSA has over 15,000 employees nation-wide.*

#### **Manager, HR Forecast Planning & Analysis, Human Resources Planning(1997 – 1999)**

Managed the competitive intelligence unit of the Human Resources (HR) function responsible for providing the HR Senior Team consultative support in the preparation of strategic plans and budgets. Serve as quasi controller for HR function.

- Conducted annual organizational capability study that assessed internal and external environments of the organization in preparation of strategic plan and budgets.
- Managed the preparation of operating (\$ 85.0 million) and capital (\$ 40.0 million) budgets for HR function.
- Conducted activity based costing (ABC) analysis of HR function that was used by consultants (Hewitt Associates) to design a service center. Projected savings of \$1.5 million annually.
- Conducted benchmark study of HR function using Saratoga Institute survey.
- Managed the HR function's \$1.4 million Information Technology budget.
- Worked with cross-functional team to design an Excel based attrition model using regression analysis to forecast turnover. Model was used to forecast early retirement program, saving \$180 million.

**WILLIAM LEVAN BYRD, CPA, CMA, CGMA**  
**PHILIP MORRIS, INC., (continued)**

**HR Business Planning Analyst**, HR, Compensation and Business Planning(1994 – 1997)

Responsible for providing strategic planning support to the Human Resources Senior Team. Reported to Vice President of HR. Provided analytical support in development of compensation plan.

- Utilized “brainstorming” sessions to identify strategic HR issues and coordinated the preparation of HR Strategic Plan to address those issues.
- Provided guidance and assistance to HR Senior Management in the development and coordination of HR operating (\$84.0 million) and capital (\$40.0 million) budgets.
- Gathered and analyzed HR’s financial history in support of external consultants (Hackett’s) best practices assessment of HR function. Results: HR function reorganized, saving \$1.8 million annually.
- Served as fixed assets and PC coordinator for HR. Managed \$1.2 million IT budget, responsible for approving all computer leases.
- Served on Total Quality Management process improvement teams for strategic planning, compensation, and recruiting. Results: reduced time to fill jobs, time to evaluate jobs and improved linkages between planning and budgeting.

**Employee Benefits Analyst**, HR, Benefits Planning & Analysis (1988 – 1994)

Responsible for planning, implementing and analyzing employee benefits plans and programs for 15,000 employees and 9,000 retirees. Prepared cost/benefit analysis position papers for labor negotiations. Provided Senior Management with analytical reviews of Philip Morris’ \$450 million employee benefit program. Responsible for governmental compliance.

- Prepared annual benefits budget of \$450 million and developed the LOTUS spreadsheet model.
- Prepared annual Form 5500s, re-negotiated health care contracts, prepared employee benefit statements and Summary Annual Reports. Led project team that revised and drafted Summary Plan Descriptions, saving \$213,000 in consultant fees.
- Planned and coordinated operational/compliance audits of healthcare carriers. Selected and supervised outside auditors, recovering \$250,000 in improperly paid claims.
- Worked closely with actuaries from TPF&C to gather historical healthcare costs and determine service costs and trends used in SFAS 106 implementation.
- Designed and implemented the Dependent Care Flexible Spending Account and Premium Conversion Plans which saves an estimated \$150,000 annually in employer taxes. Worked on team that designed and implemented managed care program. Results: Saves \$3-5 million in healthcare cost per year.
- Recommended the establishment of a VEBA Trust, generating \$100,000 in annual savings. Received Action Cost Team award.

**Plant/Managerial Accountant**, Finance (1986 – 1988)

Responsible for providing plant management financial decision support. Managed work-in-process accounting system. Prepared monthly manufacturing cost reports detailing variance analysis.

- Established cost standards for tobacco blends and cigarette brands costing \$300 million.
- Prepared \$200 million fixed overhead operating/capital budgets for manufacturing plant.
- Recommended revisiting proposal for consolidating processing plants, yielding \$3-6 million savings annually.
- Recommended implementation of the deferred profit-sharing loan program.

## **WILLIAM LEVAN BYRD, CPA, CMA, CGMA**

**US DEPT. OF TREASURY, INTERNAL REVENUE SERVICE, Atlanta, GA** **1986**  
**IRS Agent/Employee Plans Specialist, EP/EO Division**

Responsible for adjudicating letter of determination applications and auditing plans for compliance.

- Completed extensive training program for qualified plans covering ERISA, TEFRA, DEFRA, REA, and TRA 86. Graduated in top 3 of the class.
- Technically reviewed pension plans and trust documents to ensure compliance.
- Adjudicated pension plans and trusts in accordance with IRC.
- Recommended adoption of User Fee Program, which generates significant revenue for the IRS.

**AUGUSTA STATE UNIVERSITY, Augusta, GA** **1983-1986**  
**Graduate Student Assistant, College of Business Administration**

- Provided individualized instruction to undergraduate students in subject areas of accounting, computer science, and math, using microcomputers.

<b>LICENSES:</b>	Series 7 General Securities Representative	2001
	Series 66 Registered Investment Advisor Rep	2001
	Certified Management Accountant	1991
	Certified Public Accountant	1988

<b>EDUCATION:</b>	MBA (Accounting), Augusta State University	1986
	BBA (Accounting), Augusta State University	1984
	ABA (Management), Central Carolina Technical College	1981
	ABA (Accounting), Central Carolina Technical College	1981

### **PROFESSIONAL AFFILIATIONS:**

American Institute of CPAs (AICPA)

Former member of Minority Initiatives Committee

Former member of Group of 100

Former member of New Jersey Society of CPAs

Former member of Virginia Society of CPAs

Former Chairman, Minority Initiatives Committee

Former member Business Industry and Government Committee

Member of South Carolina Association of CPAs

Member, Taxation Committee

Member, Academic and Careers Committee

Institute of Management Accountants

Member of Institute of Certified Management Accountants

National Associations of Black Accountants (NABA) (Life-time member)

Member of Division of Firms (Vice-Chairman)

National Black MBA Association, Inc. (Life-time member)

Founding President of Richmond, VA chapter

Progressive National Baptist Convention, Inc. (Life-time member)

Member of Executive Board, Chairman of Audit Committee

South Carolina Legal Services Corporation

Member of Executive Board and Executive Committee and Chairman of Audit Committee

National Association for the Advancement of Colored People, Inc. (Life-time member)

Member of Executive Committee

Sumter School District; Member Ad Hoc Finance Committee