

Gregory Free, MBA, CITAM

(775) 223-4343 | gregorywfree@gmail.com | linkedin.com/in/gregoryfree

DIRECTOR

IT & Finance leader with a fascination for what makes organizations tick and a knack for making them tick faster. With over a dozen years in IT, finance, and management, I've led enterprise transformations at Walmart and UPS that optimized resources and kept finances in check. Passionate about using advanced planning, budgeting, and AI/GenAI to make decision-making smarter and projects smoother. Expert in IT asset management, governance, and compliance, always with a focus on making things run efficiently and effectively.

KEY SKILLS

IT Asset Management | Vendor Relationship Management | Budgeting | Forecasting
Advanced Financial Planning | Data Analysis | Governance | Risk | Compliance

CORE COMPETENCIES

- **FP&A:** Budgeting, forecasting, financial modeling, variance analysis.
- **Strategic Leadership:** Business transformation, process improvement, technology implementation.
- **Project Management:** Planning, scheduling, controlling, leading complex initiatives.
- **Analytical Skills:** Advanced financial modeling, data analysis, risk management, contract review.
- **Technical Proficiency:** ServiceNow, OneTrust, Jira, Confluence, UltraTax, MS Excel, PowerPoint, Power BI, BCDR, ISO 27001 & 19770, PCI-DSS, COSO, NIST, SOX, PCI-DSS, GDPR, HIPAA, SOC 2 Type 1 and Type 2

PROFESSIONAL EXPERIENCE

Anglepoint

2019 - 2024

Senior Program Manager, Key Accounts - North America

Led multi-workstream engagements and client relationship management for Fortune 500 companies. Known for aligning ITAM programs with client goals to drive value; identifying over \$250M in savings/risk.

- **Supported IT financial planning, budgeting, forecasting, and analysis** for Fortune 500 clients, including Walmart and UPS, driving informed decision-making and financial optimization.
- **Collaborated with Walmart and UPS** to enhance SAM programs, significantly improving processes through increased automation and identifying substantial cost savings.
- **Implemented and monitored internal controls** for **Marqeta**, a fintech in pre-IPO, using OneTrust and policies based on NIST, PCI DSS, and ISO 27001, ensuring robust governance and compliance.
- **Project managed the implementation** of FlexNet Manager Suite for **TD Ameritrade**, driving efficient deployment and user adoption.
- **Led the implementation of ServiceNow ITOM** for **Thomson Reuters** (9 months, ~200 contacts), successfully managing the project from inception to completion.
- **Developed a cost management model** for **JackHenry**, identifying earlier struggling deliverables, reducing project hours by 800 from the year prior.
- **Revamped reporting processes for Walmart** as part of the IBM IASP program, enabling timely submissions and eliminating the need for filing extensions.
- **Created business continuity plans for Pure Storage**, interviewing stakeholders and developing runbooks to identify processes and establish effective response patterns.
- **Addressed Log4j CVE compliance issues** for multiple clients using SCCM, Intune, CMDB, and Tanium to identify and patch vulnerabilities, ensuring compliance and mitigating risk.

Oracle

2014 - 2019

Senior Consultant & Team Lead, Licenses Management Services - Key Accounts and Enterprise

Led license compliance to protect intellectual property through strategic audits. Developed business plans, KPIs, and process improvements to ensure high-quality deliverables and efficient issue resolution across the territory

- **While serving as Interim Director**, led audit teams to uncover critical compliance shortfalls, ensuring revenue goals of \$42M was met.
- **Achieved client savings of \$9M** in new license fees by identifying and suggesting cost-reduction implementation approaches in IT asset management.
- **Trained 7 new hires** on license compliance and extended usage rights, enhancing overall deliverables, and effectiveness resolution contributing to shorter cycle times.

Microsoft (Contracted Vendor) 2012 - 2014
Program Manager, Licensee Contract Compliance - APAC

Led customer engagement for software licensing and rebates. Ensuring licensing and contractual compliance and contributing to process improvements within a global team.

- **Led the identification and remediation** of licenses purchase issues of Tier 2 OEM Distributors in APAC.
- **Collaborated with legal counsel** to design and implement a rebate and compliance program in China, Taiwan, and Hong Kong; leading to team growth and improved financial performance.
- **Reduced troubleshooting time by 94%** of monthly reporting through an improved purchase reconciliation process, significantly boosting operational efficiency.
- **Increased stakeholder engagement**, driving substantial revenue growth(\$10M) and program sustainability.

Ernst & Young 2012

Tax Senior, Global Mobility and Human Capital

Led the delivery of compliance and advisory solutions for SMB global workforce engagements. With a focus on hypothesizing US personal income tax, providing strategic tax planning advice, and managing client accounts.

- **Led financial management** of global client accounts, including \$1.5M budget development, resource allocation, and revenue recognition, ensuring alignment with strategic goals.
- **Collaborated with global clients and colleagues** to provide tax planning advice and compliance services, enhancing satisfaction and cost management.
- **Managed and developed a diverse team** of junior colleagues, providing guidance on tax technicalities and performance management, fostering continuous improvement.

Rand & Associates. Ltd 2005 - 2011

Manager, Tax and Financial Services

Supervised and trained a team of 10 to deliver tax compliance and financial services, ensuring timely completion of tax returns in over 25 states. Prepared journal entries and adjustments in line with GAAP and FAS 109, resulting in more accurate financial reporting and compliance.

- **Conducted primary and secondary reviews** of complex tax returns and ASC 740 income tax provision engagements, ensuring high standards and client satisfaction (Revenue >\$40M)
- **Managed group finances**, including budgeting, invoicing, and revenue recognition (~\$1.5M).
- **Created an expatriate tax division** based on the needs of approximately 40 clients.
- **Managed office compliance for FINRA**, ensuring regulatory adherence.
- **Represented clients before IRS** and state agencies, ensuring effective resolution of tax issues.
- **Leveraged expertise in QuickBooks**, UltraTax, Excel, and Microsoft Suite of products to improve efficiency.
- **Served as a subject matter expert** for the 2009 Internal Revenue Service “Special Enrollment Exam” (SEE).

EDUCATION | CERTIFICATIONS

Master of Business Administration, MBA, in Finance and Entrepreneurship, Gies College of Business, University of Illinois Urbana-Champaign

Bachelor of Arts, BA, in International Studies, Global Trade and Economics, Brigham Young University

Qualified CPA candidate for the Nevada State Board of Accountancy

Certified Information Technology Asset Management (CITAM), The International Association of IT Asset Managers (IAITAM)

FinOps Certified Practitioner, FinOps Foundation

Series 7 & 66 - General Securities Representative License (Inactive), FINRA

Enrolled Agent - Licensed Tax Practitioner I.R.S. (Inactive), U.S. Department of Treasury

Insurance Producer License - Licensed Life Insurance (Inactive), Utah Department of Insurance