

DR. JAMIE JOHNS

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CFO, COACH & MINDFULNESS GUIDE

Strategic and results-driven CFO with 40+ years of experience, blending innovative financial leadership with mindfulness practices to drive personal and organizational growth. Skilled at guiding executives and teams through complex challenges, fostering resilience, clarity, and intentional decision-making. Combining expertise in finance, accounting, and operations management with mindfulness training to empower leaders to align their goals with their values, creating sustainable growth. This holistic approach ensures that financial strategy is effective while promoting well-being and lasting impact across organizations.

AREAS OF IMPACT

FINANCIAL STRATEGY & ANALYSIS

MINDFUL LEADERSHIP TEAM

DEVELOPMENT & COACHING

OPERATIONS MANAGEMENT

HOLISTIC MERGERS & ACQUISITIONS

BUSINESS TRANSFORMATION

STRATEGIC GROWTH & BUSINESS PLANNING

CORPORATE FINANCE & INVESTMENTS

WORKFLOW OPTIMIZATION LEADERSHIP

TRAINING & EXECUTIVE COACHING RISK

MANAGEMENT & COMPLIANCE STRESS

MANAGEMENT & RESILIENCE

PROFESSIONAL EXPERIENCE

FOUNDER & PRINCIPAL CONSULTANT

jlj FORWARD

2024 - Present

Lead strategic growth initiatives by combining over 40 years of CFO experience with mindfulness practices to optimize personal, financial, and organizational outcomes. Provide comprehensive consulting in financial strategy, planning, risk management, and mindfulness guidance for executives, enabling them to navigate complex challenges with clarity, resilience, and intentional decision-making.

- Guide executives through the development and implementation of financial strategies that drive profitability while maintaining balance and well-being.
- Mentor leadership teams, cultivating emotional resilience, focus, and improved decision-making through mindfulness practices.
- Recent engagements include CFO leadership for a crypto start-up, managing finance, accounting, HR, and operations, and fostering a high-performing, mindful team.
- Offer extended financial strategy consultations, guiding clients in long-term growth and vision-casting.

SENIOR DIRECTOR OF CUSTOMER EXPERIENCE

ServiceTitan

2021 - 2024

On behalf of customers, envisioned and owned platform software's evolving finance and accounting functions.

- Collaborated with product development and implementation teams to create tools that empowered clients to extract the most value from finance and accounting.
- Defined key processes as well as systems for product and customer-facing teams to improve customers ability to achieve best finance and accounting practices.
- Led and oversaw the "Blue Ocean Strategy" that connects industries served with capital markets.

Conceptualized and spearheaded the FinTech refocus on product's position at POS, which became the top priority for Product Development and Data Science resourcing, including consumer financing capabilities; OEMs' warranty processing and other warranty-related capabilities; and OEMs' and lenders' rebates and buydown processing, which led to:

- Ideating and launching "Jamie's SmartLoans", a strict Nash equilibrium optimization model of my original aggressive consumer financing strategy (see John Moore LP, et al., below).
- Envisioning and developing "Smart Start", a default setup to auto move towards economic optimal outcomes at POS, which is now in development and initial version near alpha pilot.
- Creating and overseeing "Plan Optimizer", an optimizer of POS economic outcomes, transaction-by-transaction, which is now in development.
- POS ecosystem product build-out to include OEM warranty data flows and to include rebate and buydown data flows.

Ideated, developed, and managed major projects to address accounting data flow gaps, including Accounting Maturity Model and Accounting Standards Initiative, which led to:

- Building a model to detail home service company accounting data workflows, task flows, and microflows towards a consensus representation of best-in-class microflows at low, medium, and high company maturity levels.
- Researching, analyzing, and proposing an Accounting Standards Initiative to ensure accounting standards would be deployed and managed across Product, Revenue, Onboarding, Success, and Professional Services.

CHIEF FINANCIAL OFFICER

JohnMooreLP,et. a

2011 - 2021

Strategically led in vision casting, planning, and evaluation of all business functions for a consolidated group of 7 business entities, including service companies as well as finance and investment companies.

- Led the company's growth from \$42M in annual revenue with minimal profitability to \$86M with industry-leading net profitability by spearheading the first-ever ServiceTitan/Intacct integration, developing and launching an innovative consumer financing model, and executing a strategic marketing plan.
- Developed and strategically led accounting, payroll, HR, IT, finance, and risk management functions, driving operational efficiency and supporting company-wide growth.
- Drove consistent profitability growth for Old Union Financial, a wholly owned captive finance company, through innovative financial strategies and strong leadership.
- Managed complex merger and acquisition activities, optimizing value and ensuring seamless transitions.
- Guided ownership through the successful sale of home service entities to a private equity firm, securing a top EBITDA multiple and maximizing shareholder value.
- Orchestrated the profitable sale of a captive finance company's loan portfolio, exceeding projected net profit targets and delivering outstanding financial results.

CHAPLAIN

John Moore LP, et. a

2011 - 2013

Compassionately served the corporate group of 300+ families, providing pastoral care, spiritual direction, and practical theology. Provided counseling and support services to individuals and families.

- Enhanced operations, effectively managing personnel matters while consulting in decision making on finance, accounting, reorganization, and workflow analyses.

FOUNDER & PRESIDENT

HaMoreh Ministries

2006 - 2011

Led the foreign and domestic mission activities, administration, and fundraising of this not-for-profit corporation's teaching, mentoring, and resourcing ministry efforts.

- Taught, spoke publicly, and mentored teachers and leaders in colleges, universities, churches, and various meetings in Africa and domestically.

ADDITIONAL EXPERIENCE

Finance

ASSISTANT TO THE PRESIDENT, *The Criswell College*, 1 Year

CERTIFIED PROFESSIONAL ACCOUNTANT, *James L. Johns, CPA*, 2 Years

SENIOR MANAGER, *KPMG*, 8 Years

Professional

FOUNDER, DIRECTOR & ASSOCIATE PROFESSOR, *Biblical Languages*, *Houston Christian University*, 9 Years

ADJUNCT PROFESSOR, *Southwestern Baptist Theological Seminary*, 5 Years

HEBREW TUTOR, *The University of Edinburgh*, 2 Years

SENIOR PASTOR, *Bellview Baptist Church & Peabody Baptist Church*, 6 Years

UNIVERSITY EDUCATION

MASTER OF FINANCE

Tulane University

DOCTOR OF PHILOSOPHY

*Divinity
University of Edinburgh*

MASTER OF BUSINESS ADMINISTRATION

*Finance
Tulane University*

BACHELOR, BUSINESS ADMINISTRATION

*Accounting
University of Memphis*

SEMINARY EDUCATION

ADVANCED LANGUAGE STUDY

(German, Greek, Hebrew)
Southwestern Baptist Theological Seminary

MASTER OF ARTS

(Theology)
Covenant Theological Seminary

MASTER OF THEOLOGY

(New Testament)
Reformed Theological Seminary

MASTER OF DIVINITY

Mid-America Baptist Theological Seminary

MINDFULNESS TRAINING & EDUCATION

A YEAR TO LIVE, *Spirit Rock Meditation Center, Vinny Ferraro and Frank Ostaseski*

ADVANCED INQUIRY SKILLS, *Mindfulness Association*

COHERENCE MEDITATION, *Progressive & Advanced, Encephalon, Joe Dispenza*

INNER ENGINEERING, *Isha Foundation, Sadhguru*

INTERACTIVE GUIDED MEDITATION, *Jack Kornfield*

LIVING DHARMA PROGRAM, *Spirit Rock Meditation Center, Mark Coleman and Dawn Mauricio*

MINDFUL SELF COMPASSION, *Brown University Mindfulness & Health Institute, Chris Germer, Kristin Neff*

MINDFULNESS MEDITATION TEACHER CERTIFICATION PROGRAM, *Jack Kornfield and Tara Brach*

MINDFULNESS MENTOR TRAINING CERTIFICATION PROGRAM, *Banyan*

MSc, MINDFULNESS, *University of Aberdeen*

MYSTICAL SOBRIETY, *Center for Action and Contemplation, Jim Finley*

RESIDENTIAL RETREATS, *Spirit Rock Meditation Center, Sylvia Boorstein and others*

WALKING THE EIGHTFOLD PATH, *Jack Kornfield*

PROFESSIONAL CERTIFICATIONS - FINANCE

CICA, CERTIFIED INTERNAL CONTROL AUDITOR, *Internal Control Institute*

CGMA, CHARTERED GLOBAL MANAGEMENT ACCOUNTANT, *American Institute of Certified Public Accountants*

CPA, CERTIFIED PUBLIC ACCOUNTANT, *Texas State Board of Accountancy*

PROFESSIONAL CERTIFICATIONS - MINDFULNESS

CMT-P, CERTIFIED MINDFULNESS TEACHER - PROFESSIONAL LEVEL
International Mindfulness Teachers Association

MINDFULNESS TEACHER
Mindfulness Meditation Teacher Program

MINDFULNESS MENTOR
Mindfulness Mentor Program, Banyan

PROFESSIONAL ASSOCIATIONS

AMERICAN INSTITUTE OF CPAS

AMERICAN STATISTICAL ASSOCIATION

ASSOCIATION FOR FINANCIAL PROFESSIONALS

FINANCIAL EXECUTIVES INTERNATIONAL

INSTITUTE OF INTERNAL CONTROLS

INSTITUTE OF MANAGEMENT ACCOUNTING

INTERNATIONAL MINDFULNESS TEACHERS ASSOCIATION

MINDFULNESS MEDITATION TEACHERS CERTIFICATION PROGRAM ALUMNI ASSOCIATION

TEXAS SOCIETY OF CPAS

ORGANIZATIONS

AMERICAN CIVIL LIBERTIES UNION OF TEXAS, *Member & Volunteer*

BUDDHIST PEACE FELLOWSHIP, *Member & Volunteer*

THE BUDDHIST SOCIETY, *Member & Volunteer*

CENTER FOR ACTION & CONTEMPLATION, *Member & Volunteer*

CHARTER FOR COMPASSION, *Signator, Member & Volunteer*

COHERENCE HEALING PROGRAM, PERFECT LOVE GROUP, *Member & Healer*

THE JUNG CENTER, *Member & Volunteer*

THE MINDFULNESS ASSOCIATION, *Member & Volunteer*

NATIONAL ASSOC. FOR THE ADVANCEMENT OF COLORED PEOPLE, HOUSTON, *Member & Volunteer*

WORLD HINDU FEDERATION, *Member & Volunteer*

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