

## ROBERT W. BARNES

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### FINANCE/ OPERATIONS MANAGEMENT

*Operations Analysis... Forecasting... Financial Control Systems...*

Achievement oriented leader with a unique blend of strategic, creative, and technical abilities. Unique combination of financial and operations accountabilities, including business development. Resourceful professional with over seven years of senior management experience. Formulates company strategies with value creation processes designed to facilitate rapid growth. Certified in Lean Six Sigma (2010) Driven to deliver quality results on time and within budget. Highly organized and analytical problem solver with excellent negotiation, and persuasive interpersonal skills.

**Other key strengths include:** Risk Management and Assessment, Information Technology, Security Compliance, and Project Design, Management and Implementation.

### PROFESSIONAL EXPERIENCE

B&R ENERGY, LLC, Plano, Texas

2004 to Present

#### *Principal*

Transitioned out of the purely financial world and assumed what became this parallel role within two distinct businesses. Packaged and manage the syndication of \$50M+ in Oil and Gas investments for over 800 accredited investors. Researched, selected, and implemented a networked oil and gas software system to handle accounting, revenue distribution, and tracking of well expenses and profitability. Supervised and trained a staff of eight in security compliance and investor relations. Supervise communications to affiliated brokers and investors.

- Developed production tracking and analysis system and established monthly reporting requirements to create a financial forecasting system and sales tools for investors and Board of Directors.
- Reduced approval lead time and cost by 75% with the implementation of a streamlined PPM creation process in collaboration with the legal team.
- Effectively reduced overhead expenses, including mailing costs by over 50%, with an electronic payment platform that automated investor payments and processing and expedited the revenue distribution process.
- Implemented electronic storage file system for all investor records that allowed for instant access and retrieval and eliminated the need for paper files.
- Supervised all data transfer and validation testing for new systems, allowing the company to process 20x the investors in half of the time, and reduced the amount of new full time employees required by 50% as the company grew.
- Initiated the transfer of the monthly accounting for the investors to a third party in January of 2014.
- Managed the technical specification process and led website creation project.

BARNES OIL AND GAS, LLC, Plano, Texas

July 2007 to Present

#### *VP and CIO*

Following first level funding, brought into this family business to develop and supervise all financial models, websites and databases. Coordinate cross-functional strategic business initiatives with internal and external partners.

- Consolidated information from engineers and created the forecasted return model for the fund and data mined land records to validate land group work. Created an electronic filing system to allow for instant retrieval of all invoices and bills from Accounting, Executives, Auditors and the institution funding the endeavor.

- Implemented and networked oil and gas accounting software and land, lease, and asset management software that provided effective and efficient record keeping and reporting.
- Designed and implemented paperless system for all accounting and production documents and seamlessly integrated the computer accounting system, investor reporting, and outline of auditor requirements.
- Analyzed economics of all prospective asset acquisitions and evaluated all properties considered for potential sale. Organized data related to the sale for the majority of the company's assets in 2010.
- Created and maintain a user-friendly network hosting multiple companies that ensured total security.

BROOKSTREET SECURITIES CORP., Dallas, Texas

April 2005 to July 2007

***Branch Manager***

Managed Dallas, Texas branch and provided syndicated oil and gas private placements. Trained and coached direct reports selling B&R Energy products. Supervised registered brokers to ensure regulatory compliance. Added Series 24 Security Licenses to the ones that carried over from Schwab: Series 63, 7, and 8 Created and maintain a user-friendly network hosting multiple companies that ensured total security..

CHARLES SCHWAB, INC. Phoenix, Arizona

March 1993 to November 2004

***Risk Analyst***

(2001 – 2004)

Promoted to research trade issues, addressed and resolved compliance and legal inquiries, and served as an expert witness in arbitration. Prepared and provided evidence and legal testimony for Corporate Counsel and Compliance Department.

***Project Manager***

(1998 – 2001)

Brought into the line organization to manage projects that improved the electronic trading experience and offered enhanced corporate controls. Developed electronic safeguards prohibiting the sale of stock not held in accounts. Determined cause of unintended web trades and implemented corrective measures.

- Reviewed and updated the Business Resumption Plan in event of disaster.
- Reduced time required for Fed/Maintenance call report by 94%.

***Technical Representative***

(1995 – 1998)

Founding team member of startup *e.Schwab*, a low priced electronic trading division that revolutionized the trading industry. Functioned as trade manager and utilized cross-functional relationships to resolve electronic trading disputes. Original member of the "Hot Topic" team tasked with designing and implementing SOP's for problem resolution. Selected to serve on the Trade Support desk and analyzed issues

***Registered Representative***

(1993 – 1995)

Originally recruited to place trades for investors, specializing in trading mutual funds, fixed income products, and options. Addressed and resolved customer service issues.

## EDUCATION

**SMU Cox School of Business**, Dallas, Texas

Executive Education Program: Strategic Financial Skills for the Energy Industry; 2006

**Thunderbird School of Global Management**, Glendale, Arizona

Master of International Management with an emphasis in Finance, Mandarin, and Asian/Pacific Rim Studies; 1991

**Southern Methodist University (SMU)**, Dallas, Texas

Bachelor of Arts in Psychology with a Minor in Ibero-American Studies; 1989

*Studied European Community and International Marketing at SMU in Madrid, Spain Program*

**Oxford University**, Oxford, United Kingdom

Studied International Finance and Trade; Summer 1988