

ACCOUNTING, RISK, & ADVISORY SERVICES FOR THE UTILITY/ENERGY INDUSTRIES

ABOUT AC LORDI

AC Lordi is a boutique consulting firm of 100+ professionals founded in 2001 offering accounting and finance, risk and compliance, business advisory, and CFO services. We provide clients with high-level professionals with expert skills, a strong work ethic, and the proven tools necessary to complete critical projects. Headquartered in the Greater Philadelphia area, we have performed work in fifteen states and ten countries for a broad range of clients from emerging growth through multi-national organizations. We have deep experience in the life sciences, manufacturing and distribution, utilities, chemical, private equity, professional services, insurance, and software and technology industries.



Rob Bright, CPA, CFE

Rob is a Principal in the Accounting practice with 30+ years of accounting and audit experience including expertise with GAAP, SEC reporting and due diligence. A former manager with Deloitte & Touche, he provides clients with critical support in technical accounting and SEC reporting requirements.



Bill Dawson, CPA

Bill has a diverse accounting and reporting, tax, and audit background with public and privately held domestic and multinational corporations. He served as VP of Internal Audit, and later as the VP of Income Tax for a \$2+ billion specialty apparel retailer. He was also an Audit Partner and has over 18+ years of experience with PwC.



Frank Hoban

Frank has 30 years of experience in ERP, supply chain and finance IT solutions delivery. His extensive background includes business intelligence and analytics solutions design and delivery, business process redesign, and financial close cycle time reduction.

SELECTED CLIENTS

 AMERICAN WATER			
			

AC LORDI SERVICES

ACCOUNTING

- Accounting Outsourcing
- Interim Resources
- SEC and Financial Reporting
- Special Accounting Projects
- Technical Accounting
- Valuation

OFFICE OF THE CFO

- Budgeting & Forecasting
- Financial Due Diligence
- Fractional & Interim Executives
- Post-Acquisition Integration & Carve-outs
- Transaction, IPO & Audit Readiness

RISK & COMPLIANCE

- Enterprise Risk Management
- Internal Audit
- Regulatory Compliance
- Sarbanes-Oxley
- Systems Audit & Consulting

BUSINESS ADVISORY

- Business Analytics & Reporting
- ERP/Financial Systems
- Finance Transformation / Change Management

REPRESENTATIVE ENGAGEMENTS

<i>Natural gas and electric utility.</i>	AC Lordi provided Sarbanes-Oxley project management and other services to assist with its annual Sarbanes-Oxley compliance program. This included testing of entity level controls, testing of process level controls, assisting with the implementation of the company end user computing policy, control remediation, and reporting. In the project management capacity, AC Lordi was in the Lead SOX Coordinator position and acted as a liaison between the company and its external auditors. We also worked with Senior Financial Management in the coordination and reporting of SOX related issues to its holding company parent.
<i>Propane/natural gas holding company with 3 subsidiaries.</i>	AC Lordi provided technical accounting research and support related to the accounting for certain embedded derivatives (rights of offset) in debt agreements. In addition, we assisted management with the preparation of the related footnote disclosures.
<i>One of the largest power generation companies in US.</i>	AC Lordi provided technical support and on-site training related to adoption of Accounting Standards Update (ASU) 2014-09 (i.e., FASB's new revenue recognition standard).
<i>Water and wastewater utility company.</i>	AC Lordi has provided services for multiple projects, including a SOX control rationalization project and acquisition due diligence support.

