

# Paul Goldfarb

## Executive Career Biography

### Senior Global Operations Management Executive

*Delivering impossible advances in key operational imperatives*

**Leadership Brand** – A stealth leader and synergist, I connect downward, upward, and across to design business models and systems conversions that actualize the value. Maximizing “management by walking around”, I champion, energize, and unify all stakeholders. My strength is delivering the highest possible ROI, banking on the best cost basis.

A Worldwide Investment Services manager directly reporting to Paul Goldfarb distinguishes him above other top-level management by his *“unrelenting focus on quality and efficiency combined with a genuine concern and commitment for all who work for him”*. This has been a hallmark of Paul’s stellar career.

His management expertise spans the full range of operational functions – HR, IT, P&L, accounting, customer service, administration, and legal. Add to this his marketing expertise, creating value proposition to customers and penetrating new markets for services, combined with his many years of experience in the financial services industry. Paul is a well-rounded business leader equipped and driven to handle any situation impeding corporate initiatives.

A key strength is his ability to interact easily, seamlessly drawing in associates at every level and communicating with them in a straightforward, non-threatening way. This innate talent has benefitted his companies immeasurably by instilling loyalty and excitement up, down, and across organizations.

Throughout his career, Paul has brought the vision and surefire work tools to exact needed change and engage everyone in the new mission. To a person, each of the managers he has groomed over the last 20+ years say that he is the best leader they have ever worked for. Many describe him as a “true gentleman” and respect him for his honesty, integrity, and dedication.

When Paul came on board at Worldwide Investments, he was faced with a seemingly impossible total revamp of operations that would affect players at every level. As always, he hit the ground running, first boosting the morale of the team and beginning to instill renewed dedication and loyalty. This accomplished, the turnaround of key operational divisions fell into place.

Benchmarking process, system, and quality improvements across the board, the benefits Paul brought to Worldwide were substantial. He increased operating profit 14% from breakeven; established a knowledgeable, cohesive, and customer-focused workforce; grew transactions and accounts while reducing headcount 28%; reduced employee turnover 50%; and, with the conversion of TA system vendors and platforms, improved throughput and saved shareholders \$35 million.

Paul is decidedly a gifted and practical visionary. Time after time he has had the courage and wisdom to make tough, but critical, decisions. Always conscious of containing costs while executing process improvements, he manages to improve quality metrics while reducing production costs; standardize tasks and improve functionality while reducing headcount; and improve human capital efficiency and output without layoffs.

At Summit Business Strategies, Paul partners with entrepreneurial startups, corporations, and Boards of Directors to build “Operations Centers of Excellence” – the planks and pillars that lead to profitable organizations. He helps them gain control of their businesses and personal lives, and start enjoying their dreams. He shares the lessons he learned at the top corporate level developing training programs, employee tools, leadership programs, strategy and vision, customer service programs, and cost efficiency programs.

Paul proudly extends his leadership acuity to his community and has a true passion for charitable endeavors benefitting youths and children. His deep involvement with local Chambers of Commerce focuses on linking youths with the growing needs of the city and becoming leaders who improve their communities. He conducts business classes at local elementary and high schools around entrepreneurship and finance, preparing young students to move on to college with stable credit scores.

Paul and his wife Nancy helped raise over \$80,000 for a special needs school. As a member of the Finance Committee and Board, Paul helps support an Atlanta-based program moving medically fragile children out of dysfunctional homes and placing them in safer environments.

His affinity for giving back to his community stems from the guidance and support he received from his church, community, and schools when he was growing up. He would love to win the lottery to be able to establish foundations and endowments to fund special needs groups. He feels compelled to make a difference in his community.

Paul and Nancy Green live in the Atlanta, Georgia area. Susan is an accomplished interior designer. Their son lives and works in California as a certified jeweler and their daughter works with IBM. He and Nancy greatly enjoy traveling by car, train, plane, or ship and plan to retire on a lake or river, surrounded by mountains. Paul is an avid motorcyclist, soloing on trips as long as 4,500 miles, and loves taking week-long trips with his son to trout fish and talk.

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