

Scott G. Wheeler, CMA, MBA

EXPERIENCE: State of Vermont Department of Public Service

Utilities Finance and Economics Analyst

➤ 10/18 – Present

- Responsible for analyzing and evaluating the economic and financial impact of petitions submitted to the Public Utility Commission to ensure that they will serve the general good of the state.

Sentinel Investments, a subsidiary of National Life Group

Vice President - Fund Administration & Assistant Treasurer

➤ 07/07 – 11/17

Assistant Vice President & Assistant Treasurer

➤ 03/98 – 07/07

Senior Portfolio Accountant

➤ 05/93 – 03/98

Portfolio Accountant

➤ 08/90 – 05/93

Staff Accountant

➤ 06/86 – 08/90

- Accountable for the full administration, audited financial results and related SEC filings for fifteen (15) mutual funds.
- Exposure to international funds, fund mergers, multiple class funds, taxes and presentations to the Board of Directors.
- Had established relationships with State Street Bank in Kansas City and Boston for Custody and Portfolio Accounting (MCH), ICE Data Services, Inc. for Security Valuations and Confluence with respect to Financial Reporting and Performance software.
- Former voting member of management's Valuation and Disclosure Committees.
- Previously responsible for managing and motivating a staff of five (5) mutual fund accountants prior to outsourcing daily pricing.
- Assisted in the implementation of an innovative system for tracking profitability by product line.
- Formerly FINRA Series 7 Licensed.

Dubois & King, Inc., Randolph, Vermont

Project Accountant

➤ 06/85 – 06/86

- Managed the payroll process and related tax withholdings.
- Prepared invoices and statements to bill for services rendered.

VOLUNTEER: Granite Hills Credit Union

Former Chairperson of the Board of Directors

➤ 06/05 – 06/17

- Responsible for oversight of a \$40 million financial institution.
- Oversaw a successful merger with NorthCountry Federal Credit Union.

PROFESSIONAL

DESIGNATIONS: Institute of Management Accountants
Certified Management Accountant (CMA)

EDUCATION: California Pacific University
Master of Business Administration (MBA)

LaSalle University
Bachelor of Science in Business Administration (BS)

Champlain College
Associate of Science in Accounting (AS)