



### **Debbi-Jo Horton, Principal**

WorkPlace Dynamics, Inc.  
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[www.WPlaceD.com](http://www.WPlaceD.com)

#### **Professional Statement**

Apply my financial and organizational leadership expertise, experience, and education for the success of a corporation, individual, or non-profit organization

#### **Awards**

- 1998 Accountant Advocate of the Year for the SBA's Small Business Week
- 1997 Bryant College Alumni Leadership Award
- 1996 Woman in Business Advocate of the Year for the SBA's Small Business Week Nominated
- 1996 Accountant Advocate of the Year for the SBA's Small Business Week
- 1995 Warwick Business & Professional Women's Federation
- 1994 Woman of Achievement
- 1993 Young Careerist – Warwick Business & Professional Women's Federation
- Small Business tax expert for Congress

#### **Education**

- Masters of Business Administration, *Global Organizational Leadership*—Candidate, May 2008
- Certified Public Accountant, 1995 – retired license in July 2002
- Bachelor of Science, Accounting, Bryant College, Smithfield, RI, July 1988

#### **Professional Summary**

##### WorkPlace Dynamics, Providence, RI 1999 – Present

- **Principal**—Create dynamic workplaces where employees become engaged in the business of the organization and feel more connected to their work, through organizational and leadership training. As principal, responsibilities include: marketing, assessing the client's situation, and delineating the needs to be addressed; developing customize programs to deliver the results, and selling that program to management. Scheduling, and facilitate trainings and round table sessions. Evaluating the end-results and implementing an on-going continence and improvement plan that can be self-administered or administered by the WorkPlace Dynamics staff. Write, create, and implement business plans.

##### Office Central, a Division of WorkPlace Dynamics, Providence, RI 1999-Present

- **Principal**—Responsibilities include: overseeing and managing the entire operation and staff. Provide consulting services to our clients for database management, administration, bookkeeping, taxation, CFO, COO, HR functions, special events, and professional writing.

##### DJ Horton & Associates, CPA Firm, East Providence, RI, 1989-1999

- **Principal & CPA**—Responsibilities include: producing business, trust, estate, and personal tax returns. A tax and financial advisor for Individuals, Estates, Trust, Charitable Foundations and Businesses. Lecturer, trainer, and group

Facilitator; overseeing a variety of a financial issues; managing multiple teams, meetings and conferences, as well as budgets, plans, and execution of events and projects. Create customize software packages for individuals and trusts to summarize their investments. Provide trust accounting for courts, lawyers, and beneficiaries. Asset management for clients that include: household, property management, and the placement of funds and investments; provide trust administration, create and maintain business development teams of strategic partners; assist in obtaining bank financing for client business loans and reporting their compliance with agreements and regulations.

Ernst & Whinney," Big 5 Accounting Firm" Providence, RI 1986 – 1989

- **Staff Accountant**—Responsibilities include: provide tax preparation, tax planning and financial planning for Individuals, Estates, Trusts, Charitable Foundations, and Businesses. Assess client's tax and financial situations and outline the needs and issues to be addressed. Provide general business planning and review of client company business plans and assisting in the execution of those plans. Provide personal and business budgets and analysis. Create software packages for individuals and trusts to summarize their investments and providing trust accounting for courts, lawyers, and beneficiaries. Serve as a liaison between client companies and the audit teams assigned to audit the books and records of clients.

### **Affiliations, Associations, and Publications**

New England Regional Taxation Implementation Chair to the 1995 White House Conference on Small Business

AICPA (American Institute of Certified Public Accountants)

- Member of the Small Business Committee
- Rhode Island Society of Certified Public Accountants

Chambers of Commerce – Greater Providence (Ambassador), East Providence, Central Rhode Island and Northern Rhode Island

Smaller Business Association of New England (SBANE); Small Business Administration Advisory Council

Presentations

- Presented before national audiences for organizations such as the White House Conference
- Small Business, National Association of Business & Professional Women, the US Army, the US Congress and Corporate Clients.
- Testimony to the US Senate Small Business Committee on Home Office Deduction, Independent Contractor and 100% Deductibility of Health Insurance for the self-employed. Testimony to the US House of Representative Ways and Means

Publications

- *Emerging Leaders* – a 36 Hr. Leadership Development Course; *Evolving Leadership* – Book Authored *Emerging Leaders an Experiential Guide* – Book Authored; “*Communication & Teambuilding*” – 8 Hr. Course” *Uniting – The Engagement Process*” – Presentation and process deliveries.