

# Joshua M. Boyd, CCIM

361-389-6901

jmboyd08@yahoo.com

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## KEY SKILLS

- Created reporting and analytic functions for many different aspects within finance including business operations, portfolio analytics, revenue tracking and reporting, and capital deployment strategies.
- Acquisition and development modeling for all commercial real estate asset types
- Creation of market studies for potential investments (economic data, demographic data, market gaps, etc.)
- Asset management analytics
- Staff mentoring and training.
- Advanced Excel and financial modeling knowledge
- Software implementation and reporting for business models
- Strong quantitative financial analysis skills
- Accustomed to working in a fast-paced, decision driven environment

## WORK EXPERIENCE

### GI Alliance - San Antonio, TX

2023 – 2024

#### Senior Financial Planning and Analysis Manager – Gastroenterology Consultants of San Antonio

- Responsible for strategic and financial analysis across the company (12 locations) requiring in-depth knowledge of key business drivers.
- Developed invoicing procedure in order for better reimbursement tracking between surgical partners and GCSA.
- Conduct financial analysis, modeling, forecasting, and reporting efforts to ensure efficient financial operations.
- Responsible for ownership entities operations, invoicing, and capital calls.
- Responsible for monthly ownership distribution modeling (~\$2M)
- Develop insightful suggestions for investment, sourcing, and cost reduction, and leads strategic business decisions.
- Develop staff through mentoring and skill development to drive next-level leadership.
- Proactively drive process improvements for speed and accuracy of reporting and analysis

### Las Aguilas Associates - San Antonio, TX

2019 – 2023

#### *Formerly Whataburger Family Office*

#### Investment & Portfolio Management – Real Estate

- Investment modeling focused on market data, assumptions, and scenarios while tracking changes to financial key performing indicators.
- Portfolio management and reporting focused on performance and strategy of ~\$2 billion portfolio.
- Cash forecasting, management, and reporting of real estate segment for treasury and consolidated operating segments.
- Develop annual capital deployment strategy (\$40M - \$70M annually)
- Organize consolidated budgeting and forecasting for real estate portfolio.
- Economic trend analytics looking at growth trends, GAP analysis, capital markets, etc. within potential investment location.

### Whataburger - San Antonio, TX

2013 – 2019

#### Financial Planning and Analysis Professional III (Whataburger Family Office) 2016 – 2019

- Creation of cash management functions for current portfolio and future investment strategies.
- Investment modeling investigating market conditions and adjusting assumptions showing potential impact on investment.
- Financial planning and consolidation of Whataburger finance departments annual forecast.
- Onboarding and performance evaluation of direct reports.
- Created cash forecasting, management and budget forecasting functions for all new commercial real estate and holding companies.
- Investment modeling for strategic business strategy.

#### Staff Accountant 2013 - 2016

- Accounting and reporting functions for entire restaurant segment (786 restaurants) and five different operating entities totaling over \$3B in sales annually.
- Creation of budget and reporting function for internal maintenance company.
- Creation of policies and procedures for restaurant accounting function.
- Internal audit preparation for entire restaurant segment.
- Vendor management and compliance

### Chaparral Market - Victoria, TX

2010-2012

#### Owner

- Financial analysis of business to set specific direction of company.
- Training employees to follow procedures of business to ensure quality of service remains constant.
- Payroll and scheduling
- Overall business operations of the company ensuring product awareness to increase sales.
- Trend analysis for products within store to utilize space during specific time periods.
- Inventory management.

**Regency Nursing and Rehabilitation - Victoria, TX:**

**2008-2011**

**Assistant Administrator (2009-2011)**

- Revenue Tracking and Labor reports to ensure revenue is adhering to set budget for nursing home rates.
- Budget tracking to ensure department leads were controlling budget.
- Analysis of department manager budgets for compliance to ensure budget is closely followed and policies are being followed.
- Environmental Control to ensure proper policies and procedures are being followed and paperwork is being submitted in a timely manner.

**Staff Accountant 2008-2009**

- Performed full cycle accounting and reporting submitted to ownership on monthly, quarterly, and annual basis for three 120 bed skilled nursing facilities.
- Reconciled bank statements on a monthly basis for all operating and non-operating entities.
- Created annual budgets for all skilled nursing facilities within my Region.
- Full cycle payroll processing for all three facilities.

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**EDUCATION**

Bachelor of Business Administration – Accounting, **Texas A&M University – Kingsville**

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**CERTIFICATIONS**

Certified Commercial Investment Member, Designee # 23593

Bloomberg Markets Concepts

Long Term Care Certificate (in progress) – Saint Joseph College of Maine

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