

## Tony Novak

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### WORK EXPERIENCE

- **Certified Public Accountant**, 1987 - current
  - Serving for-profit and nonprofit small business clients in diversified fields including construction, environmental and food service. The focus of work is automating and savings in the functions of financial reporting and tax compliance
  - Contractor to a CPA firm preparing individual and business tax returns
  - Writer and speaker for the New Jersey Society of Certified Public Accountants on topics related to the Affordable Care Act
  - Wrote and recorded CPE programs for National Seminars Training, Rockhurst University
  - Taught personal financial planning at Delaware Valley University evening school division
  - Instructor for a professional continuing education course called "*Current Events in Employee Benefits*" offered to accountants, attorneys and financial planners
  - Wrote many articles and gave public presentations live and recorded on issues related to small business management through a range of publishers and business associations
  - Founded, built and sold MedSave.com, a first-generation insurance exchange
  - Operating under trademarks "Freedom Benefits" and "OnlineNavigator"
  - Formerly operated as a Registered Investment Adviser under SEC, PA and NJ
- **Auditor** with Pennsylvania Public Utility Commission, 2013-2014
  - Audited PECO Energy and First Energy electric and gas rates in Southeastern PA to meet auditing experience requirements of Delaware State Board of Accountancy
  - Promoted from Auditor Trainee to Auditor 1 after one year of service
- **General Agent** for diversified financial services agency, Narberth PA, 1987-2006
  - Managed a sales office that recruited and trained more than 20 agents
  - We produced more than a million dollars per year revenue for Fortis Financial Group
  - Recognized by Assurant Health as the nation's top producer of supplemental non-insurance health benefits in 2003
  - Awarded by Time Insurance and Celtic Insurance for exceptional client retention of small business employee benefit clients
- **Account Executive** with Drexel Burnham Lambert in Jenkintown, Pennsylvania, 1986-1987
- **Pension Accountant** with Pension Plan Services Inc. in Philadelphia, Pennsylvania, 1985-1986

### EDUCATION

- **Masters in Taxation**, Villanova Law School, 1995, focus in compensation planning
- **Master in Business Administration**, Temple University, 1985, focus in finance & accounting
- **Bachelor of Science Degree** from Delaware Valley College, 1982
- Methacton High School, Fairview Village, PA 1978

### LICENSES, REGISTRATIONS, SOFTWARE

- Certified Public Accountant, State of Delaware, #CC-0003632, February 2014
- Licensed life, accident & health insurance producer in all 50 states and DC, NAIC #2048780
- NASD license series 3, 6, 7, 15, 22, 26, 65 (inactive)
- QuickBooks ProAdvisor and FreshBooks Certified Accountant
- Ultra Tax, Drake tax software and Vend retail accounting software experience
- Microsoft Office including Excel and Word