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D CEO Events

Winners Announced: Financial Executive Awards

Honorees in this year's program include leaders from AECOM, Dialexa, DZS, and Excellence in Corporate Governance Award winner Larry King.

By Will Maddox | April 27, 2023 | 12:08 pm

FINALISTS ANNOUNCED

Financial Executive Awards 2023

Honoring top corporate financial executives in Dallas-Fort Worth



D CEO revealed the winners of its 2023 Financial Executive Awards at a private event Tuesday night at On the Levee in the Dallas Design District. The program, presented in partnership with the Association for Corporate Growth, TXCPA Dallas, and Financial Executives International, celebrates CFOs and other financial professionals who play a critical role in their companies.

These leaders have been especially challenged lately, as they deal with unusual obstacles, discover opportunities, and grapple with uncertainty while forecasting for the future.

All finalists are recognized in the May issue of *D CEO*. Be watching for a photo recap and additional reports in the coming weeks.

Financial Executive Awards 2023 Honorees

Emerging Leader in Finance

Michael Castaldo of Texas Security Bank

Michael Castaldo of Texas Security Bank surpassed his loan and deposit goal by 210 percent last year. That's quite a performance. In recognition of his achievements, he was recently promoted to vice president and associate managing director, a role that has him leading a team of three other bankers. Throughout challenges he has faced in his career, Castaldo says he has learned the importance of four key things: the resiliency of his teammates, the importance of a company's culture, that planning is key, and that relationships matter.

FINALISTS

Ray Estep of Transmira

Whitney Franklin of JPS Health Network

Matias Zatonyl of CBRE

Outstanding Internal Auditor

David Price of The University of Texas at Arlington

UTA's David Price has chaired the Dallas chapter's board of governors for the DFW Chief Audit Executive Round Table for the last eight years. He is also the first internal auditor to serve on UTA's President Leadership Council. During his career, he has led his audit team to identify more than \$25 million in vendor overcharges and fraud. Last year, UTA received about \$6.2 million from the National Research University Fund. He and his audit team took a hands-on approach and got involved early on. This gave the organization time to react to audit feedback well before the submission date and make any needed course corrections, which resulted in the best possible outcome.

FINALISTS

LaToya Duncan of EnLink Midstream

Jessica Grigsby of JPS Health Network

Achievement in M&A Finance

Tom Zelewski of RumbleOn

Zelewski's career has been peppered with work on mergers and acquisitions transactions that have shaped the North Texas community. He served as vice president of finance for AMR Global Services, a \$550 million subsidiary of American Airlines, as it acquired several airport-focused businesses and was involved in the Sabre Corp.'s spinout from AMR Corp. He helped Arlington pet product manufacturer Petmate reach \$200 million in revenue and sell to a Chicago PE firm in 2011. More recently, he led North Texas-based Freedom Powersports to \$225 million in revenue before guiding it through an acquisition by Irving-based RumbleOn.

Innovative Finance Team

Priority Power, led by Joe Loner

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Priority Power closed 2022 by refinancing its existing debt and increasing its credit facility from \$85 million to \$250 million. ' company currently manages approximately \$3 billion in energy,

spend for more than 7,000 clients across 40 states and has completed \$300 million of energy infrastructure projects with an additional \$1 billion in various stages of development. Over the last 18 months, the finance team—which is comprised of 15 professionals—has closed four significant deals, including its acquisition of Texas-based AB Power Advisors and the acquisition of the energy procurement, consulting, and solar development business of Affordable Gas & Electric Company, which serves more than 125,000 residential and 1,000 commercial customers.

FINALISTS

The Dove Agency

Santander Consumer USA

True North Advisors

Valor

Outstanding Chief Accounting Officer, Controller, or Treasurer - Private Company

Karyn Brown of Austin Industries

Last year, understanding that her company wanted to take advantage of its exceptional credit worthiness and market

conditions before they changed, our winner was able to negotiate a five-year, \$200 million line of credit that improved its rates, fees, and covenants from a previous five-year deal. The efforts helped the company realize at least \$1 million in savings. One of her key leadership strategies is to encourage people on her team to challenge the status quo and try new things and new processes. “It helps us improve and keep innovating,” she says.

FINALISTS

Katy Casso of Ansira Partners

Barbara Georgakis of Westmount Realty Capital

Adam Powell of Valor

Outstanding Chief Accounting Officer, Controller, or Treasurer - Public Company

Donna Burgess of AECOM

Last year was a big one that saw Burgess and her team implement a global transfer pricing strategy that aligns her company’s tax reporting with its “think and act globally” strategy. It involved educating senior executives, operational executives, finance teams, IT teams, and legal teams from around the globe. The enorm

endeavor was more complex and took longer than expected, but in the end, it was a success. Burgess says that one of her key leadership strategies is to empower the members of her team to do their jobs. “I know they are capable, and I allow them to show that they are,” she says. “I am always available to the team to help guide and direct them, and they know I have their backs. This strategy provides them with a solid backstop to be the best they can be.”

Outstanding CFO of a Small Private Company

John Stone of JacksonShaw

When it comes to 2022, two achievements stand out for Stone: one is about numbers, and the second is about people and culture. On the numbers side, he led the execution of \$280 million in real estate transactions—significant for a company that generates just \$10 million in revenue. And on the people and culture side, our winner led a transformation of his company’s accounting and finance teams from “back office” to “front office” groups, which involved a literal move to the front of the company’s headquarters in recognition of the critical importance of their work. The intentional moves have increased commitment, retention, teamwork, efficiency, and operational effectiveness.

FINALISTS

Kristin Frost of Worlds

Sohail Hamirani of Mohr Partners

Outstanding CFO—Midsize Private Company

Moe Haidar of Dialexa

Haidar was one of the earliest employees at his company, where he initially took on both operational and finance leadership. He has since led the company through rapid growth without any external capital and continued at the helm of the finance team he has built out as CFO. He helped his team implement a new enterprise resource planning system in a fraction of the time it typically takes—in the middle of the pandemic. More recently, he helped guide the company through an acquisition by IBM Consulting.

FINALISTS

Don Clevenger of Oncor

Scott Gressett of Oceans Healthcare

Greg Jaynes of LMC Landscape Partners

Jeff Peterson of Lightbeam Health Solutions

Michel Provosty of RREAF Holdings

Outstanding CFO: Nonprofit Organization

Marsha Beasley of Parkland Health Foundation

In the last year, Beasley has focused on reimagining her organization's entire business model to align with other social service organizations and holistically serve patients. That means considering new funding arrangements and partnerships that wouldn't have been on the table before. With a need to innovate and grow, our winner works to equip her team with the ability to problem solve, which improves performance and team morale. Beasley is working to help patients have access to the resources they need beyond healthcare, improving outcomes a.

care for the underserved and disenfranchised in our community. One way she has helped make that happen is by developing a tool to project revenue for her organization, which is especially important given the cyclical nature of philanthropy. It has made the organization more nimble and stable in uncertain times.

FINALISTS

Joshua Audi of Catholic Charities Fort Worth

Chetana Chaphekar of DHA

Robert Fries of Children's Health

Jennifer Mitzner of Baylor Scott & White Health

Outstanding CFO: Small Public Company

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Manmeet Soni of Reata Pharmaceuticals

Soni is proud of how his team has worked together to work with federal regulators to bring new products to market that can make life-changing impact on thousands of individuals in the United States. When jumping through regulatory hoops, our winner knows that developing leaders who challenge the status quo and ask the hard questions is essential to success. Throughout his career, Soni says he has learned that success is never a straight path and sees setbacks as an opportunity to grow. As he says, “an ability to learn and adapt quickly in the face of obstacles is critical to maintaining a successful organization.”

Outstanding CFO, Large Public Company

Misty Kawecki of DZS

Kawecki helped her company achieve the highest growth in its history, through both organic growth and the acquisition of software assets that helped drive significant shareholder value from inception. Last year was a significant one, as she guided the company through a follow-on equity raise. Working in an entrepreneurial, customer-first, ultra-fast paced culture, one of her key leadership strategies is to empower employees to run the business as if it were their own. “This drives a culture of innovative ideas and transformation driving improvements and supporting growth,” Kawecki says.

FINALISTS

Scott Cooke of Toyota Credit Corp.

Ken Dodgen of Primoris Services Corp.

Scott Richardson of Celanese Corp.

Dan Winston of Boeing Global Services

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The Constantine “Connie” Konstans Excellence in Corporate Governance Award

Larry King of the Private Directors Association

Larry King is an exceptional example of the person the award is meant to honor—someone who through vision, commitment, leadership, professionalism, and ethics has achieved a level of excellence in corporate governance that serves as an inspiration to others in the business community. King is co-founder of the Private Directors Association’s DFW chapter, program committee chair for both the local chapter and national Private Directors Association.

King is also an active board member, whose service over the past few years has included a privately held early-stage SaaS tech company in Dallas, another startup focusing on blockchain, AI, and quantum technologies; a public company in the managed services provider space, and Amegy Bank. “The companies I serve on the board and advisory boards of will continue to face challenges in 2023 and beyond,” he says. “And I will continue to draw on my

experiences to work with my fellow board members to provide oversight and guidance to navigate the choppy waters.”

King also has made longtime, exceptional contributions to the Association for Corporate Growth and other professional organizations. One would be hard pressed to find a leader who is more passionate about promoting and serving his industry than him.

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