

## Treasurer Curriculum Vitae Form

**ADA** American Dental Association®

America's leading advocate for oral health

211 East Chicago Avenue  
Chicago, Illinois 60611

The ADA Treasurer Curriculum Vitae Form should be completed in its entirety. If additional space is required, attach extra pages with the same section titles and in the same order. Although it is permissible to attach an existing curriculum vitae, the use of "see attached CV" in any section is discouraged. In accordance with the Governance Manual, this document will be distributed to the members of the House of Delegates at least 60 days prior to the convening of the House. No other candidates shall be nominated from the floor of the House.

11/2020

## American Dental Association Treasurer Curriculum Vitae Form

Name:     Cody C. Graves    

<b>PERSONAL INFORMATION</b>	Date: 05/05/2024
Office Address:	Phone: 325-648-2251
1318 Fisher St., Goldthwaite, TX 76844	Fax:
	E-mail: drc@centex.net
Home Address:	Phone:
4 Rim Rock Rd, Goldthwaite, TX 76844	Fax:
	E-mail:

<b>EDUCATION</b>	Year	Degree
College: University of Texas at Austin	1992	BS
Dental School: Texas A&M Health Science Center Baylor College of Dentistry	2003	DDS
Dental Specialty Training: GPR, VA Hospital	2004	
Other: St. Edward's University	1996	MBA

<b>LICENSURE</b>	State	Year
Doctor of Dental Surgery	TX	2003

<b>ACADEMIC or PROFESSIONAL APPOINTMENTS (Location)</b>	Rank	Year(s)
Teaching:		
Research:		

## American Dental Association Treasurer Curriculum Vitae Form

<b>PROFESSIONAL SOCIETY MEMBERSHIPS (excluding ADA)</b>	Offices Held
Texas Dental Association	President, Secretary/Treasurer
American College of Dentists	
Academy of Dentistry International	
Pierre Fauchard Academy	
International College of Dentists	
Fellow in the Academy of General Dentistry	
Texas Academy of General Dentistry	
Christian Medical and Dental Society	
Boy Scouts of America Eagle Scout	
Independent Bankers Association of Texas	

<b>DENTAL PRACTICE (location)</b>	Dates
1318 Fisher St., Goldthwaite, TX 76844	2005-current

<b>HONORS and AWARDS</b>
Texas Dental Association's President's Award, 2019
Texas Dental Association's Incoming President's Award, 2023
Nominated for Texas Academy of General Dentistry's New Dentist of the Year, 2010

<b>COMMITTEES—DENTAL ORGANIZATIONS (including ADA)</b>	Dates
21-B Heart of Texas Local Component Society Peer Review Chair	2009-2014
Texas Dental Association Council Peer Review	2014-2015
Texas Dental Association Minutes Review Committee	2015-2024
Texas Dental Association Executive Committee	2015-2024
Texas Dental Association Executive Director Search Committee	2017

## American Dental Association Treasurer Curriculum Vitae Form

Texas Dental Association Task Force for Patient Safety	2018
Texas Dental Association Chair of Budget and Finance	2015-2022
Texas Dental Association Publications Task Force	2019-2020
Texas Dental Association Building Renovation Task Force and Financial Steering Committee	2018-2020
Texas Dental Association Dental Reimbursement Plan chair	2020
Texas Dental Association Succession Planning Work Group	2018
Texas Dental Association Personnel Committee Chair	2024-current
Texas Dental Association Executive Committee Chair	2023-2024
Texas State Board of Dental Examiners Expert Panel Review Member	2014-current
ADA Member of Strategic Forecasting Task Force	2021-2022
ADA Member of Strategic Forecasting Committee	2022-2023
ADA Co-Chair of Dentist to Tripartite Subcommittee	2023-2024
ADA Member of the Finance Service Task Force (credit union)	2023-2024
ADA Member of the Task Force on Dental Practice Recovery	2020
ADA 15 <sup>th</sup> District Delegate	2017-current
ADA 15 <sup>th</sup> District Vice Chair of Delegation	2023-current
ADA HOD Reference Committee A Chair	2019
ADA 15 <sup>th</sup> District Caucus Vice Chair	2023-current

<b>OFFICES HELD—DENTAL ORGANIZATIONS (including ADA)</b>	<b>Dates</b>
Secretary/Treasurer, Vice President, President of 21-B, Heart of Texas Local Component Society	2008-2010
Texas Dental Association Chair of Budget and Finance Committee	2015-2022
Texas Dental Association Secretary/Treasurer	2015-2022
Texas Dental Association President-elect, President, and Past President	2022-current

**American Dental Association**  
Treasurer Curriculum Vitae Form

<b>PRESENTATIONS—LOCAL, STATE, NATIONAL (list five most recent)</b>		
Topic	Society	Date
1. Texas Dental Association Outgoing President's Address	TDA House of Delegates	May 2024
2. Texas Dental Association Incoming President's Vision Speech	TDA House of Delegates	May 2023
3. Strategic Forecasting Town Hall	ADA	Oct 2023
4. Texas Dental Association Financial Forum	TDA House of Delegates	May 2021
5. Texas Dental Association Financial Forum	TDA House of Delegates	May 2020

<b>ARTICLES PUBLISHED (list three most recent)</b>
1. Texas Dental Journal, March 2022, pg. 134-142, <i>Covid, A Hybrid Meeting, and a Dues Increase</i>
2. Texas Dental Journal, March 2021, pg. 204-211, <i>The Covid Impact on 2020 and the 2022 Budget</i>
3. Texas Dental Journal, April 2020, pg. 218-225, <i>The 2021 Budget with 2019 EOY</i>

<b>PREVIOUS FINANCIAL and BUDGET EXPERIENCE (including the ADA)</b>
<p>BA in Economics from the University of Texas at Austin</p> <p>MBA from St. Edward's University</p> <p>Treasurer or Financial Chair of First Methodist Church Goldthwaite for 10 years</p> <p>Treasurer of the Texas Dental Association for 7 years</p> <p>Board member (18 years) and Vice Chair (5 years) of MC Bank Board of Directors, includes Budget Chair for a financial institution with assets in excessive of \$450 million,</p>

**American Dental Association**  
Treasurer Curriculum Vitae Form

**Describe your background in finance and any service in roles such as: Treasurer of a constituent society or specialty organization; member for two or more years of a Finance Committee or Audit Committee of a constituent society or specialty organization; member of a board of directors of a for-profit corporation or for-profit subsidiary of a constituent society or specialty organization; or any other position(s) providing comparable experience.**

My background in finance is extensive. I have developed sharp business acumen through my education, leadership experience, and active engagement in both the for-profit and non-profit worlds.

I earned a degree in Economics, from the University of Texas at Austin, and a Master's in Business Administration, from St. Edward's University, to further enhance my financial knowledge. I have served as treasurer/finance chair in several organizations, including local school non-profit for 3 years, church for 10 years, local dental society, and Texas Dental Association for 7 years.

During my tenure as Treasurer for the Texas Dental Association, I restructured our investment policy as well as reviewed and changed our investment advisors. This provided TDA with more transparency, reduced fee structure, and increased yield on our investments. Furthermore, I worked collaboratively with TDA's for-profit subsidiary leadership to examine and update the policy regarding dividends to TDA as the sole shareholder to minimize the tax liability.

Additionally, I have served on the Board of Directors at MC Bank for 18 years and as Vice Chair for the past 5 years. This position provides me with extensive fiscal management and budgeting knowledge for a bank that is over \$450 million in asset size. With MC Bank, I also serve as chair for the Technology Committee and Compensation Chair along with being a member of the Investment Committee, Director's Loan Committee, and Executive Committee. In 2014, I earned the designation of Certified Community Bank Director from Southern Methodist University's Southwestern Graduate School of Banking. Given my position as Vice Chair of MC Bank's board, I participate in the periodic review of the bank's investments much like a treasurer would do for the ADA working directly with our investment advisors. Along with our bank CEO, I also have a fiduciary responsibility to oversee the management of the retirement program for our bank employees, again the same responsibility as the ADA Treasurer.

In my role as Vice Chair of MC Bank Board of Directors, I attend many financial meetings across the country listening to and learning of new financial and investment strategies. Not all will be applicable to the role of ADA Treasurer but does allow me to continue to sharpen my knowledge of financial budgeting and account management. Not only do I gain financial knowledge, but I am also able to get a sense of how best to communicate the financial message to others as well.

# American Dental Association

## Treasurer Curriculum Vitae Form

**Describe your experience with the ADA budget process and finances, including any experience gained from serving as a delegate, trustee, council member or similar service.**

I have served on three significant ADA task forces:

1. **Task Force on Dental Practice Recovery** (the tool kit many states used for dentists to get back to work during Covid). Although this task force did not deal with finances directly, in a roundabout way its outcome could have had a major financial effect on the ADA. It showed the strength of our association is not only in our finances but in how quickly we can respond to a disaster that affects both our membership and our association in unique ways. This task force proved the ADA can be a nimble organization and we need to continue to work toward being as responsive as possible in our future endeavors.
2. **Strategic Forecasting Task Force and currently co-chair of the Tripartite Subcommittee.** I was fortunate to be asked to serve at such a level at the ADA and drawing from my experience on the Dental Practice Recovery Toolkit Committee, I knew we could move quickly. And although SFC does not have a direct financial component, our Subcommittee was able to work with the Finance Committee and submit our evaluations and recommendations that were used to direct the Finance Committee on the viability of various programs within the ADA that would remain within the Financial Operating Plan (FOP) structure.
3. **Financial Task Force (ADA Credit Union creation).** I am fully aware of the need for ADA to develop non-dues revenue stream and have been impressed with the speed at which our Task Force has been able to move on submitting our charter for the ADA Credit Union. I have been able to utilize my experience in the banking industry to help guide our Task Force during our deliberations.

Additionally, having reviewed our ADA finances during the past many HODs, along with attending the Treasurer's Summits, I have a general working knowledge of ADA finances. With this knowledge comes the understanding of why we have shifted to the FOP process and why we need to keep increasing our non-dues revenues. During the past three years as I have worked with the ADA through my positions as President of TDA I am acutely aware of our membership market share and how the new membership model is projected to increase numbers and share by reducing dues, thereby necessitating the need for additional revenue sources.

**Explain how you plan to assist in interpreting Association finances and effectively share financial information with the House of Delegates and membership.**

The role of the Treasurer is to work with the in-house financial team as well as the economic experts hired to advise the association, act as an advisor to the Board and SFC, translate numbers into words for those groups and help shape the association's fiscal goals.

While doing that, the treasurer should not be swayed by politics and personal agendas, keep individual opinions to a minimum during those discussions and offer factual information when financial questions or issues arise.

My goal is to be efficient and transparent with members' monies by communicating on a regular basis to keep the House of Delegates, SFC and the association as a whole informed. My role is to interpret the finances of the association and to present it in a digestible way for our members. As I always tell my patients, you cannot make an informed decision unless you have the necessary information to make that decision. I will carry that philosophy and transparency forward to our members as ADA Treasurer

**American Dental Association**  
Treasurer Curriculum Vitae Form

**What experience in dental association service, dental practice, dental education or private business would qualify you to serve as treasurer of the American Dental Association? What special skills or knowledge do you offer? (250 words or less)**

Most of this has been covered previously, so I will keep this short but as a solo general dentistry practice owner I came into an established practice and reworked or set up a number of new systems to improve our financial systems within the office. I applied similar principles as I worked through our executive positions at the component and constituent associations as well as the volunteer organizations whose finances I helped to manage over the past 10 or more years. I drew on processes and systems learned through my Economics degree at the University of Texas and my MBA degree at St. Edward's University. Working closely with the CEO, CFO and CLO of our bank, I continue to learn and keep abreast of the latest Generally Accepted Accounting Principles, all knowledge that makes me a valuable asset for such a fiduciary role for the ADA.

**Why do you want to be the ADA Treasurer? What do you hope to accomplish?**

I want to be the ADA Treasurer for the same two reasons I became the Texas Dental Association Secretary/Treasurer: to make the association more efficient and to be transparent about our members' monies. The ADA was created to help protect dentistry as a profession and members spend their hard-earned money to join—and those monies must be used judiciously for the betterment of our profession. Part of my responsibilities as Treasurer is to work with the Executive Director, the Finance Committee and the board to yield results in all areas of finance to bring the most value to ADA membership for our members.

Politics should not sway the treasurer. The treasurer needs to be financially astute, factual, ethical, and a clear communicator. I believe I have done an excellent job of informing the Texas members about their association's finances, leading the organization to make better investment decisions, and have left the TDA in an overall better position. That will be my goal for the ADA if I am elected as ADA Treasurer.