

Name, CGMA, CPA
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SUMMARY

Proven CFO: Financial Planning, Modeling, Analysis, Audit, Budget, Accounting, Tax, Treasury, Legal, SEC Compliance

Self-directed and driven financial executive with a comprehensive background leading the functions of finance, tax, SEC filings, legal, human resources, technology and facilities and cross-functional management teams to ensure success and achieve financial goals. Known as an innovative thinker with deep knowledge in accounting, audit, tax and securities. Recognized as a highly intuitive, organized, creative problem solver who excels at guiding CEO's and boards of directors through complex business decisions and advising on the practical implications on financial reporting. Ability to quickly identify issues, create corrective tactics and implement solutions. Demonstrated success in maximizing performance by employing thorough analysis of details to gain understanding of emerging issues, trends and external relationships as appropriate through due diligence. Current on SEC Hot Topics.

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|-------------------------------|-----------------------------------|-----------------------------|
| • Budget, Tax, Accounting | • Cash Management, Treasury | • US GAAP |
| • Technical Accounting | • Risk Management | • Sarbanes Oxley Act (SOX) |
| • Share Based Compensation | • Venture Capital, Private Equity | • SEC Regulations |
| • Revenue Recognition | • Public Offering, Fundraising | • ERP, Oracle, SAP, Intacct |
| • Cloud Computing, SaaS, PaaS | • Software, Hardware | • E-Commerce, Technology |
| • Digital Media and Ad-Tech | • Biotechnology | • Medical Devices |
| • Information Technology | • Aerospace, Military | • Pharmaceuticals |

PROFESSIONAL EXPERIENCE

Wyatt Capital Management, New York, NY
Chief Financial Officer (CFO), Controller

2016 – Present

Wyatt Capital is a leading, multinational private equity, alternative asset management and financial services firm. As a large alternative investment firm, it specializes in private equity, credit and hedge fund investments with \$10 billion under management.

- Responsible for \$50M global revenue and ten direct reports. Promoted to CFO by board of directors and the CEO.
- Enabled revenue growth and cost reduction, as measured by KPI's, by implementing best in class oversight and process of accounting, finance, tax, treasury, legal, human resources, facilities and information technology.
- Improved process efficiency through coordinated systems training (SAP), and operational initiatives.
- Collaborate with external financial reporting group on SEC filings, SOX compliance and complex accounting.
- Prepare quarterly tax provisions (under ASC 740 / FAS 109) and state filings.
- Drove double digit revenue and gross profit growth, improved gross margin and EBIT margin.
- Led due diligence on strategic merger and acquisitions (M&A).
- Participated in creating multiyear strategic plan, annual business plan and department budgets.
- Improved client attrition and non-performing accounts by creating P&L analysis by product and by customer.
- Achieved financial independence from primary investor by restructuring debt and improving working capital.
- Improved business intelligence by developing KPIs and fueled by reports and the implementation of a new SAP ERP.
- Design and negotiate contracts, leases, employment and compensation agreements.

Reardon Technology, New York, NY
Assistant Controller

2012 – 2015

Reardon is a high-tech manufacturing and software developer in both the defense and commercial sectors.

- Responsible for technical accounting, revenue recognition, purchase accounting, SEC quarterly and annual reporting, comment letters and managing the external audit. Implemented Hyperion business intelligence software.
- Prepared and led presentations for audit committee meetings.
- Reduced the monthly close calendar by 86% and the SEC filing calendar by 30%.
- Evaluated M&A targets, including pre-acquisition due-diligence, culminating in the acquisition of the top competitor.
- Reengineered financial processes resulting in the remediation of significant deficiencies in internal controls.

Taggart Financial, New York, NY**2009 – 2012****Financial Consultant**

Taggart is a technical accounting consulting practice specializing in GAAP, IFRS, Sarbanes Oxley, mergers and acquisitions, SEC reporting and senior to CFO level staff augmentation.

- Outsourced controller for client organizations public companies: \$8B medical device, \$1B software and \$200M global technology; private equity and venture capital backed companies and industries: pharmaceutical and software companies.
- Led client engagements including M&A due-diligence, purchase accounting, revenue recognition, technical accounting, debt accounting, equity accounting, share-based compensation and restructurings.
- Managed Sarbanes Oxley and SEC design and compliance reporting.
- Become a subject matter expert in the areas of revenue recognition and share-based compensation.
- Grew revenue and market share by launching company into new business sectors and verticals.

E&Y (Ernst & Young), New York, NY**2006 – 2008****Senior Manager, Audit**

EY is one of the largest and respected professional service firms providing audit, tax and transaction advisory services.

- Audited financial statements for public, private and VC backed companies in a variety of industries including: professional services, pharmaceuticals, software, medical devices, bio-tech and technology.
- Demonstrated aptitude and ability to efficiently run audit engagements and identify key areas of audit risk resulting in promotion to manager within seven months of onboarding.
- Audited complex business transactions and high-risk areas for public and private clients.

Kraft Heinz, Pittsburgh, PA**2000 - 2005****Senior Manager, Budgets & Forecasts**

- Oversaw monthly financial forecasting of a \$4.2B revenue food division.
- Leadership role in transitioning the Financial Planning Department's systems and procedures.
- Lead Administrator role for Hyperion Planning systems supporting 9 separate Business Units (BU's).
- Trained BU's on financial forecasting software (Oracle, SAP, Hyperion Planning, Essbase and Pillar).
- Supervised and developed staff of five (3 Profit Forecast Analysts / 2 Cost Accountants).
- Responsible for monthly financial forecasting of a \$1.1 billion (Net Sales) subsidiary company.
- Built brand and channel-level income statement forecasts from Sales, Marketing, Customer Service, Operations departments.
- Worked closely with the Controller's Department, Operations and S&M to analyze variances to forecast.
- Worked with the Executive Leadership Team on valuation models for potential merger activity.
- Worked on cross-functional teams in support of new business (R&D, Marketing, etc.).
- Integrated new financial systems based on the company's chart of account changes.

PwC (Price Waterhouse), New York, NY**1995 - 2000****Staff Accountant / Tax Preparer**

- Performed financial statement audits in accordance with GAAP, assisted tax dept. on tax reviews.
- Clients included manufacturing, construction (percentage of completion contracts) and nonprofit.
- Assisted in preparation of financial statements for certain smaller clients of the firm.
- Reviewed 10-Q, 10-K and S-1 filings to the Securities and Exchange Commission (SEC).
- Prepared federal and state tax returns for corporations, partnerships, individuals and trusts.
- Provided expertise to clients in SEC reporting, GAAP compliance, Sarbanes-Oxley and other matters.
- Led training and development in specific industry areas and technical subject matters, e.g., FIN 46.

EDUCATION

B.A., Bachelor of Arts, Finance, New York University, 1995

CERTIFICATIONS

Chartered Global Management Accountant (CGMA)
Certified Public Accountant (CPA)