

BESPOKE SEARCH GROUP
CFO

AREAS OF EXPERTISE

- Annual operating budget development
- Long-range strategic planning
- IPO & Public company readiness
- Fundraising model development
- International expansion and tax strategy
- Supply chain development
- Building out finance & accounting teams
- Management of HR and Legal functions
- Financial performance analysis and reporting
- AICPA and PCAOB audits and tax strategy
- Medical device, life sciences, CPG and SaaS

EMPLOYMENT

Confidential ·

Head of Finance & Administration

February 2018 to April 2023

Confidential is a group of medical device, diagnostic and drug development companies. The companies strive to transform 21st century medicine by solving today's most challenging problems across life science research tools, medical devices, and therapeutics. Areas of focus include: novel drugs development for rare diseases such as neurodegenerative disease and cancer; medical devices including handheld ultrasound, portable MRI, and specialized ophthalmic devices; a diagnostic testing platform; and DNA/RNA sequencing. The group consists of pre-commercial, commercial and public companies.

- Led financial workstreams raising \$2 billion dollars of capital in both public and private transactions
- Managed all finance and accounting activities for 3 SPAC/IPO transactions
- Commercially launched multiple medical device companies with expansion to 20+ countries inclusive of standing up multiple contract manufacturers, 3PL's, and major supply agreements
- Selected and implemented full technology stack including ERP, PEO, banking platform, commercial card program, equity management software, and expense reporting
- Oversee HR, legal and facility functions
- Orchestrate all FP&A activities including annual budgets, interim updates, strategic plans, and fund-raising decks
- Collaborate and counsel leadership team members across a variety of critical subject matters consisting of pricing strategy, international expansion, business risk identification and mitigation, manufacturing & distribution, and S&OP
- Develop and maintain strong service provider relationship including commercial bankers, investment bankers, auditors, tax advisors and outside counsel on both general and IP subject matters
- Negotiated and secured 40K square feet of office space across US and international locations
- Setup multiple domestic and international legal entities including C corps, branch offices, wholly owned subs, and complex LLC structures
- Led international tax structures including transfer pricing studies and cost-plus arrangements

Confidential · New York, New York

Head of Finance

February 2013 to January 2018

Confidential was a measurement and rating services company focused primarily on customer service performance. The business consisted of two main products. X stress tested hundreds of e-commerce metrics through a network of secret shoppers and then licensed data back through a proprietary platform as a SaaS offering. X was another SaaS offering that sent feedback requests to customers post interaction for use of rating and rewarding service representatives. The company was eventually sold for \$100MM to X which at the time was a public company on the NYSE.

- Developed and maintained company financial model
- Created and implemented annual planning process and full FP&A function
- Closed \$37MM of financing and secured \$10MM of debt financing
- Successfully outsourced accounts payable and transactional accounting
- Managed corporate HQ site selection, lease negotiation and buildout
- Designed sales and client success comp plans
- Led strategic acquisition of in-store secret shopper business

- Acted as in-house counsel for all supplier agreements and customer contracts
- Spearheaded compliance with EUGDPR and other data protection

Confidential (Market Intelligence Unit) · New York, New York
Director of Finance & Operations

November 2007 to January 2013

Confidential, is a leader in financial information and analytics. The market Intelligence Business provides real time data, research, news, and analytics to institutional investors, investment and commercial banks, insurance companies, investment advisors and wealth managers, corporations, and universities.

- Provided monthly results analysis with key operating metrics
- Ensured internal controls and policy compliance were maintained through BS reviews, SOX compliance, and order to fulfillment reconciliations
- Managed the development of the business unit's annual operating plan
- Finance expert on revenue recognition and oversaw all billing and revenue accounting
- Led the sales finance support effort including the design, implementation, and target setting of the sales compensation program
- Business Unit lead on tax matters
- Managed and supported acquisition integrations including post deal earn-outs and TSA's
- Migrated a \$200MM business unit's billing system/CRM and revenue recognition process/procedures to a new internal platform
- Finance team member that managed a successful \$300MM acquisition; included due diligence, oversight of the purchase price WC adjustment (saved the company \$1MM), and conformance of business to GAAP
- Led the finance effort for the design & implementation of a new sales compensation program for a team of 400+ participants

Confidential (sold to S&P global) · Boca Raton, Florida
VP of Finance & Operation

May 2006 to October 2007

Confidential provided software and services focused on investment management. It licensed a proprietary software named X that enabled quantitative investment managers to develop portfolio strategies, portfolio optimization, backtesting, and risk modeling. The company was eventually sold to S&P global for \$40MM.

- Managed the company sale including all related diligence requests, financial statement preparation, and support of all legal purchase agreements
- Built out finance, HR, and IT functions
- Secured multiple rounds of bridge financing for working capital needs
- Headed the post-acquisition integration
- Co-led the design and implementation of the sales compensation program

Unilever · Englewood Cliffs, New Jersey, Baltimore, Maryland & Bayamon, Puerto Rico

Finance Director- Lipton Tea & Slim Fast

February 2006 to April 2006

Finance & Operations Director- Unilever Puerto Rico

March 2004 to January 2006

Commercial Controller- Pepsi Lipton Tea Partnership

November 2001 to February 2004

Financial Manager- Tea Business Unit

January 1999 to March 2000

Supply Chain Controller- Tea Business Unit

January 1998 to December 1999

Assistant Supply Chain Controller- Margarines Business Unit

January 1997 to December 1997

Assistant Finance Manager

December 1995 to December 1996

Unilever is one of the largest CPG companies in the world with revenues over \$50B. The company manufactures and sells many of the leading products in both the foods and personal care sectors. Some of the most notable brands include Dove, Knorr, Ben & Jerry's, Axe, Hellmann's and Breyers.

- Led the planning & reporting, and decision support functions for businesses units more than \$800MM
- Oversaw general accounting activities and compliance including month end close, local statutory requirements, and tax
- Directed business unit level corporate risk management, SOX, policy compliance, and business risk assessment
- Managed due diligence efforts and post-acquisition integrations of multiple acquisitions & divestitures

- Led Risk/Opportunity discussions with leadership team to ensure delivery of growth and profit targets
- Spearheaded all margin optimization efforts
- Reviewed and approved all CAPEX and new product introductions, ensuring strategic alignment and achievement of financial hurdles
 - Maintained supply chain KPI's to maximize favorable working capital levels
- Designed and implemented new warehouse and distribution model leading to a full restructuring/outsourcing generating annual savings more than \$500K
- Spearheaded and executed local 936 tax strategy leading to avoidance of US tax liabilities and maintenance of reduced local tax structure
- Implemented local capital gains tax strategy and achieved \$7.5MM in cash from associated building sale
- Led the business to two years of double-digit revenue and profit growth & launched three significant innovations within an 18-month window
 - Executed an \$11MM sales-leaseback transaction and rolled out a R&D tax credit worth \$2MM
 - Successfully launched first national tea innovation in over 10 years
 - Prepared a financial assessment of long-term tea sourcing strategy leading to a significant margin improvement through manufacturing consolidation

StarMedia · New York, New York

Director- Domestic & International Finance

April 2000 to October 2001

StarMedia was a Latin American Internet brand as the first pan-regional Internet portal for Spanish and Portuguese speaking audiences. During the dot.com boom of the 1990s, StarMedia raised the first dollar of venture capital for a Latin Internet company, and then did the first IPO in the sector, while becoming one of the top 10 biggest sites on the Internet. In total, StarMedia raised over \$500 million in a series of private and public offerings, reaching a market capitalization of over \$3.8 billion at its peak.

- Developed and implemented all global budgeting, forecasting and reporting processes including implementing Cognos
- Managed overall domestic and international month end close with reporting close package
- Reviewed all business development transactions for financial return and commitment including all post transaction contingent payment calculations
- Supported the preparation of all 10k and 10Q releases and fielded analyst follow-up calls
 - Defined, enforced, and rolled-out global revenue recognition policies and procedures
 - Developed key company quarterly performance metrics for CFO and analyst calls
 - Key team member of Corporate Development team that successfully raised \$36MM of private placement financing

Kellogg Company · Battle Creek, Michigan

MBA Rotation Program

January 1994 to November 1995

Hay Management Consultants · Jersey City, New Jersey

Associate, Executive Compensation

May 1992 to December 1993

Sequa Capital Corporation · New York, New York

Credit Analyst

May 1989 to August 1990

EDUCATION

NEW YORK UNIVERSITY, Leonard N. Stern School of Business

MBA Finance, May 1992

STATE UNIVERSITY OF NEW YORK AT ALBANY, The School of Business

BS Finance, May 1989 *Summa Cum Laude*

G.P.A. 3.97/4.00 Dean's list all semesters, Beta Gamma Sigma Honor Society member

Varsity Soccer and Varsity Wrestling