

# Bespoke Search Group

## EXECUTIVE SUMMARY

A finance executive with extensive experience building accounting, finance, treasury, and analytical departments; transforming those departments into data-driven strategic functions; helping businesses grow revenue, improve profitability, manage capital, and evaluate strategic transactions; and helping companies get public company ready. Expertise includes:

- Accounting/Reporting Frameworks
- Business & KPI Analysis
- Treasury Management
- Financial/Analytical Frameworks
- Scalable Systems & Processes
- Board/Investor Relations
- Budgeting/Forecasting
- Cross-Functional Partnerships
- Strategic Transactions

## PROFESSIONAL EXPERIENCE

### **Confidential, Series B Chief Financial Officer**

**New York, NY  
Mar 2022 to Jun 2023**

Hired by a high growth technology company in the contingent work-force space to manage all accounting, finance, and treasury functions and to bring financial rigor to their strategic decision-making/planning (50%+ yoy rev growth).

- Upgraded the finance function to provide department level reporting, budgeting, and forecasting.
- Upgraded reporting/analytical capabilities to provide better insights into profitability and future capital needs.
- Worked cross-functionally with the engineering team to upgrade platform reporting capabilities.
- Leveraged improved financial data to help the company better understand costs and improve pricing/margins.

### **Confidential Chief Financial Officer**

**Los Angeles, CA  
Dec 2021 to Mar 2022**

Recruited by the executive team/investors of a distressed and capital-intensive company in the custom mobility space (camper vans, food trucks, medical vans, and solar trailers) to implement better financial processes/controls and to improve profitability.

- Provided the executive team and board with improved visibility into the current business/financial metrics, short/long-term forecasts, as well as project and business scenario analysis.
- Partnered with the manufacturing team to identify cost savings and implement working capital efficiencies.
- Worked with internal and external stakeholders to renegotiate contract terms and improve profitability/cash-flow.

### **Confidential, IPO May'21 Chief Financial Officer**

**New York, NY  
Apr 2018 to Nov 2021**

Recruited to upgrade the finance function of a high growth transportation company (40% yoy rev growth). When I joined X they had built out a platform to track flights and passengers, but had no robust financial systems – they could not track revenue, had no functional forecasting, budgeting, or KPI reporting, and were using cash accounting.

- Worked with the internal technology team to define info needs/data flows and improve platform capabilities.
- Introduced new accrual accounting, budgeting, forecasting, and daily KPI reporting capabilities.
- Leveraged better insights to improve gross margins by 3-21% across different products.
- Worked with the CEO and Head of Corporate Development to take X public.

### **Confidential Chief Financial Officer; Chief Operating Officer**

**New York, NY  
Aug 2017 to Mar 2018**

Recruited by a consortium of VC firms to evaluate and help turn around a distressed portfolio company, reporting directly to the board. X offered an end-to-end solution (design, production, marketing, and distribution) for existing brands wishing to launch their own eyewear category.

- Analyzed the business, operations, and licensing agreements and forecast capital needs.
- Upgraded/streamlined processes to improve accuracy and efficiency of operations and decrease working capital.
- Renegotiated licensing deals to create operational efficiencies and improve profitability.
- Refocused the ecommerce strategy to leverage brand equity/improve customer conversion rates.

**Confidential****Chief Financial Officer; Head of Re-engineering****New York, NY  
2013 to Aug 2017**

Hired by a high growth company selling women's apparel and accessories through domestic and international wholesale, e-commerce and retail channel to upgrade their finance, accounting, FP&A, treasury, legal, and human resource functions and to better manage their growth and significant investments in working capital (30% yoy rev growth).

- Upgraded their accounting/finance/analytical frameworks and segmentation to improve visibility into profitability.
- Worked across functions to improve understanding of seasonal revenue cycles, reduce investments in working capital, and better forecast capital needs.
- Leveraged business insights to increase gross margins by 5-15% across different products.
- Analyzed and negotiated legal agreements covering all manner of business transactions.

**THE WHARTON ANGEL NETWORK****Chief Financial Officer; Co-chair****New York, NY  
2011 to 2012**

Finance lead for a startup company with a mission of "empowering entrepreneurs to cultivate big ideas and advance significant technologies by providing access to investment and human capital".

- Designed and built all accounting, finance, reporting, budgeting, and analytical frameworks from the ground up.

**BANK OF AMERICA MERRILL LYNCH****Vice President – Investment Banking (Capital Markets Strategies)****New York, NY  
2005 to 2011**

Led the analysis, execution, and management of approx. \$10Bn of international investment and funding transactions.

- Negotiated and executed international investment/funding transactions ranging in size from \$150M to \$1Bn.
- Collaborated with internal and external experts to manage all tax, legal, accounting, regulatory, and operational issues across multiple entities and jurisdictions.
- Valued companies and securities, and built out forecasts and sensitivity analysis to economic and market factors.
- Designed and implemented hedging strategies across multiple entities, jurisdictions, and currencies.

**CREDIT SUISSE ASSET MANAGEMENT****Equity Analyst; Assistant Portfolio Manager; Product Controller****Sydney, Australia  
1998 to 2002**

Joined CSAM's institutional investment team and completed special projects for the country CFO.

- Valued companies, evaluated investments, and made portfolio recommendations, assisting in the 10x growth in assets under management during a 5-year period.
- Established and maintained relationships with brokers, investor relations departments, and external analysts.
- Set up two new departments (Legal & Compliance department and Performance Analysis department).
- Designed and implemented a new performance analysis system, reducing reporting timelines by 80%, and chaired project committee meetings attended by the country CEO, CFO, CIO, and CTO.

**EDUCATION****THE WHARTON SCHOOL, UNIVERSITY OF PENNSYLVANIA****Master of Business Administration (with Honors); Majors in Finance and Strategy****Philadelphia, PA****AUSTRALIAN NATIONAL UNIVERSITY****Bachelor of Laws (with Honors); Bachelor of Commerce****Canberra, Australia****ADDITIONAL INFORMATION**

- *Certified Public Accountant*
- *Other:* US permanent resident (green card holder); Keen alpine skier (competed in the World Championships)