

BESPOKE SEARCH GROUP
CFO

CONFIDENTIAL – CFO

An early-stage venture capital firm

New York, NY
2022 – Present

- Responsible for 39 U.S.-based entities, including 8 audited funds with over 150 LPs and 70+ active portfolio companies, as well as various GP entities, SPVs, and operating entities, plus several European entities.
- Oversee tax and audit, quarterly and annual reporting, complex carried interest calculations, and cash management.
- Lead relationships and negotiations with banks, auditors, fund administrators, insurance carriers, landlord, and vendors.
- Additional responsibilities include compliance, HR and payroll, and IT. Led IR for a period of a few months.
- Develop management company forecasts and budget-vs.-actual analyses.

CONFIDENTIAL – CFO

A 200-employee private equity -backed developer, manufacturer, and distributor of pharmaceuticals

2018 – 2022

- Headed a 10-person accounting team.
- Directed financial strategy, FP&A, reporting, revenue management, contracting, investor relations, and M&A initiatives.
- Scaled financial and customer revenue management systems to support net annual sales growth from \$19 to \$50 million.
- Developed forecasts, budgets, and multiple-scenario analyses used for board-level strategic decision making.
- Secured a \$30 million asset-backed lending facility under exceptionally favorable terms.

CONFIDENTIAL – CFO,

An early-stage VC fund and accelerator backed by X

2015 – 2017

- Helped raise over \$25 million of financing, including sourcing, pitching, negotiating, and closing.
- Developed the firm's operating and investing budget.
- Established systems for FP&A, financial controls, reporting, portfolio tracking, and investor communications.
- Ran X's 25,000 sq ft, 150-seat, state-of-the-art accelerator facility with high capital efficiency.
- Cultivated deep corporate sponsor relationships, helping create 220-strong corporate mentor & expert network.
- Helped portfolio companies find investors, create presentations, and negotiate contracts.

CONFIDENTIAL – CFO

A 30-employee VC-backed SaaS technology company

New York, NY
2014 – 2015

- Assumed financial, operational and HR leadership of the company. Instituted financial controls and operational processes.
- Completed a \$5.5 million debt and equity financing round under attractive terms.
- Initiated analyses of operational data leading to profound changes in processes, product pricing, and compensation structures.

EQUITY ANALYST / VICE PRESIDENT

NEW YORK, NY AND STAMFORD, CT, 2006-2014

- Covered the Consumer and Retail sector together with a 6-year #1 *Institutional Investor*-ranked senior analyst as an inseparable team working for **COWEN AND COMPANY** (sell-side brokerage), **DAWSON-HERMAN** (a long/short Pequot spin-off hedge fund with \$3.4 billion under management), and **CONSUMER EDGE** (a sell-side boutique).
- Lead associate on the #1 *Institutional Investor*-ranked **SANFORD C. BERNSTEIN** team covering Tech Services and Consulting.
- Developed primary research tools and leveraged proprietary data sources to accurately predict financial results.

CONFIDENTIAL – Principal, Venture Capital

An early- and growth-stage venture capital fund with over \$750 million under management

New York, NY and London, UK
2001 – 2006

- Sourced and managed equity investments in the U.S., Israel, and Europe. Held board seats in five portfolio companies.

EDUCATION

THE WHARTON SCHOOL, UNIVERSITY OF PENNSYLVANIA

M.B.A. in Finance, Palmer Scholar (top 5%, highest academic honor)

Philadelphia, PA
May 2001

- Summer internship with Patricof & Co Ventures / Apax Partners in New York.