



## EXECUTIVE PROFILE

### Industry Experience

Biotech  
Hardware  
Internet  
Manufacturing  
Medical Devices  
Professional Services  
Public Accounting  
Publishing  
Retail  
Software

### Functional Experience

Acquisitions (incl. Due Diligence)  
Budgeting & Forecasting  
Business Planning  
Cash Flows Management  
Financial Reporting (incl. SEC Requirements)  
Financial Statement Close Process  
Financial Analysis  
Debt Financing & Raising Capital  
Internal Controls  
Policies & Procedures  
Revenue & Expense Management  
Risk Management  
Strategic Tax Planning  
Technical Accounting  
Treasury Management  
Working Capital Requirements

### Systems Experience

Great Plains  
Microsoft Office  
QuickBooks

### Certification

Certified Public Accountant  
Commonwealth of Massachusetts

### Relevant Business Experience

§ Served as Chief Financial Officer for a USD 20 million public company that provides human capital management software and services. Directed the company's overall financial operations, including accounting, taxes, treasury, financial planning/analysis, SEC reporting, and investor relations.

§ Determined appropriate accounting for company's complex notes exchange. Developed policies and procedures to appropriately monitor and convert notes into common shares. Furthermore, assisted in the presentation to existing note holders to induce total conversion.

§ Ascertained the appropriate treatment for highly technical and complex accounting and financial reporting issues. Topics included, but not limited to, revenue recognition (particularly software), share-based compensation, consolidation matters, software development costs, debt instruments, impairments, restructurings, warranty, and SEC comment letters.

§ Lead audit teams on various local clients and large multi-national subsidiaries, both public and private, reporting under US GAAP, IFRS, and local GAAP. Oversaw multiple concurrent audits / projects that comprised from five to ten professionals per team ranging from 200 to 5,000 hours per engagement. Coordinated different teams in various offices in multiple disciplines. Managed engagement budgets, invoicing, and profitability for USD 2.8 million in professional fees.

§ Assisted clients in performing equity and debt transactions in the US and/or Europe ranging from gross proceeds of a few million to USD 1.75 billion. Assisted in the preparation and review of registration statements and prospectuses. Liaised with underwriters and legal counsel through the different transaction stages. Have held discussions with potential outside investors and analyzed their proposed investment vehicles.

§ Identified potential acquisition targets and developed valuation models for such (standalone value and combined value identifying merger synergies). Analyzed capital structure to determine appropriate financing. Held initial discussions with investment banks and reviewed various offering memorandums.

§ Involved with Sarbanes-Oxley Act Section 404 implementation and procedures, and internal and external reporting that included evaluation of internal controls and communication of weaknesses, including proposed internal control improvements.



### Relevant Career Experience

2010 – Current    Beacon CFO Solutions LLC  
*Partner*

2009 – 2010      Workstream Inc.  
*Chief Financial Officer*

1995 – 2009      Ernst & Young  
*Partner*

### Education

Bentley College Graduate  
School of Business  
MS – *Accountancy*

St. Anselm College  
BA – *Finance*