

LINDA G. FENTON

949.306.6107 • lgfenton@gmail.com

PROFESSIONAL SUMMARY

Finance Executive with a passion for driving results and creating value through systematic process. Collaborative team builder that adapts and succeeds in fast paced, high growth, and changing environments. Trusted advisor to CEO and members of the Board of Directors for high growth start-ups and pre-IPO healthcare, tech, and real estate companies looking for private-to-public, public-to-private, or startup business planning. Extensive experience in strategic and financial planning with strong ability to influence decision-making.

- Strategic Planning
- Operational Finance
- Accounting Operations
- Real Estate Optimization
- Enterprise Risk & Compliance
- KPI/Metrics Dashboards
- Succession Planning
- Leadership Development
- Investor Relations
- Business Planning/Annual Budgets
- Financial Planning & Analysis
- Product Pricing
- Compensation Program Design
- Team Building

EXPERIENCE

SPRINGBOARD ADVISORY SERVICES, LLC

2013 – PRESENT

ORANGE COUNTY, CA

Consulting firm specializing in fractional CFO services, strategic/operational business planning, & executive coaching

PRINCIPAL

- Select engagements include compliance consulting for an Orange County home health care agency, strategic planning for a provincial based, multi-city senior assisted living/retirement home system, and integration, strategic planning, and business planning for a digital healthcare start up.

WELLTOK, INC.

2014 – 2017

DENVER, CO

Leading consumer health enterprise SaaS company, driving greater value for customers across the healthcare continuum including payers, employers, government programs (Medicare and Medicaid) and providers by increasing revenue and operational efficiencies, and improving quality of care. Empowers consumers to achieve and sustain their optimal health using an enterprise SaaS platform and technology-enabled services to identify, target and reach consumers. Named as one of the fastest growing companies to INC 5000 (2017,2016,2015), Deloitte Technology Fast 500 (2016,2015), Forbes Cloud 100 (2017)

SENIOR VICE PRESIDENT, CHIEF FINANCIAL OFFICER

- Scaled company from startup to emerging with strong SaaS revenue growth of >1,400% from 2013 to 2016 while building the employee base from 30 to 400+ FTEs.
- Raised over \$170M in capital from leading venture capital firms and strategic investors
- Led IPO preparedness activities as an option for potential strategic exit
- Acquired and integrated six companies to build out strategic platform capabilities
- Responsible for full spectrum finance and accounting operations, including investor relations and strategic planning
- Optimized real estate footprint across six offices nationwide
- Established nationwide procurement program

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TRIZETTO CORPORATION (NOW A COGNIZANT COMPANY)

2002 – 2013

DENVER, CO

Healthcare IT company that provides information technology solutions to commercial payers and providers to reduce the administrative cost of healthcare

Senior Vice President, Chief Risk & Compliance Officer

- Managed investment fund of ~\$80M annually for discretionary business investments. Directed investment decision process and ensured achievement of ROI objectives.
- Established and directed Enterprise Risk Management program including annual risk assessment, internal audit, and risk remediation projects. Reported to the Audit Committee of the Board of Directors.
- Executive lead for an initiative to select location and build-to-suit a new Corporate Headquarters of 200K SF; negotiated \$2.5M in tax incentives for generating new jobs in Colorado

Senior Vice President, Finance

- Acting CFO during transition periods from 2007-2009 including speaking engagements during public company period at investor conferences, earnings calls, and investor and Wall Street analysts' meetings
- Instrumental in a \$1.4B take-private transaction by Apax Partners in Q3 2008
- Reviewed SEC filings including 10K, 10Q and earnings releases
- Modeled financial guidance for disclosure to investors and Wall Street
- Managed Accounting group (70 FTE) and Finance group (18 FTE)
- Managed monthly business operations review process including financial performance review of actual to budget, forecasts, business trend metrics, business unit profitability, and capital investments
- Managed and guided the annual business planning cycle for all business units including the development of the strategic business plan, tactical revenue planning, capital planning, operating budgets, and workforce planning
- Managed the design and implementation of two automated planning software packages: Great Plains Enterprise Reporting and Oracle Financial Analyzer
- Prepared and analyzed quarterly trends in financial statement forecasts (BS, IS, Cash Flow)
- Guided business unit executives in presentation of operational performance highlights for Executive Management conferences held periodically during the year
- Advised on multiple task forces regarding the development and reporting of key management information (balanced scorecard, dashboard KPIs, standard policy and procedures, intranet content, project management)

INTERLIANCE, LLC,

1999 – 2002

COSTA MESA, CA

Boutique management consulting firm focused on technology, oil & gas, and educational industries

Director, Client Services (Consulting, Financial Advisory and Global Business Services Divisions)

Directed financial operations: cost accounting, budget development, invoicing and collections, profitability analysis, cash management

- Directed administrative management and control of operations; established and administered infrastructure systems, IT systems, and related policies and procedures

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- Managed Talent Resources: Recruitment and selection of all delivery team talent, resource career development, professional training programs, utilization, and performance management

Engagement Lead

Led client projects from strategy design through implementation with full P&L responsibility. Managed teams of 4-40 to deliver solutions in IT, Human Resources, Finance, and Operations areas.

- Designed the strategic measurement system to align KPIs and metrics to corporate objectives with management accountability for an IT services firm
- Delivered a web-based Executive Information System for a Fortune 500 public utility company
- Performed a pipeline feasibility study for supply/demand scenarios in the oil and gas industry for a government commission
- Designed the business processes and automation tool solution for a professional services firm
- Delivered a Sales Force Automation platform for a network services firm
- Designed and implemented an mid range accounting system for an IT start up
- Designed role competency models, job descriptions, training skills inventory, and collaborated on organizational design for an IT services firm.

SOUTH COAST HEALTH SERVICES, INC.

1996 – 1999

LOS ANGELES AND ORANGE COUNTY, CA

Community based Medicare and Joint Commission accredited home health care agency serving Orange and Los Angeles counties

Vice President, Finance and Administration

- Directed financial management and planning for government and private insurance plans; recommend and implement actions for improving financial, quality of care and human performance metrics
- Managed the administrative/human resources functions for staffing, benefits, training, and compliance.
- Managed the design and implementation of a client/server patient care tracking program to compile statistical data and provide management KPIs to analyze the cost of patient care delivered within Federal budget constraints
- Lead the business analysis team for evaluating the long-term impact on the 1997 Balanced Budget Act
- Implemented fiscal policy and regulatory compliance measures in accordance with government agencies
- Reduced per patient costs by 31% over an 18 month period through improved operating efficiencies
- Successfully negotiated the sale of the Los Angeles agency – sale price that exceeded market expectations

CAL FED BANK (NOW CITIBANK)

1987 – 1996

LOS ANGELES, CA

One of the largest nationwide savings bank with \$28 billion in assets and 700+ locations

Vice President, Budgeting & Organizational Profitability

- Co-chair of the Executive Management Budget Committee with Bank President to address budget variances, business unit KPIs, and requests for funding increases
- Directed the cost containment initiatives to reduce operating expenses by \$168 million or 37% over 5 years
- Managed the development of the organizational profitability model, methodology and transfer pricing for Bank subsidiary and established management reports utilized by senior and line management as a key indicator of profit center/division performance for basis of retail market sales and acquisition activity

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- Directed budget administration and management reporting for Parent Company, Bank and subsidiaries of \$450 million of expense and \$150 million in capital across 150 business units
- Key contributor to financial summary presentations for Board of Directors and investor Roadshows

Assistant Vice President, Training & Development

- Designed a comprehensive 13 month training program that cycled college graduates through savings operation, lending operations, and administrative operations
- Evaluated and counseled trainees in program performance
- Managed university relations and college recruiting program to keep a qualified pool of candidates available for entry into the program every three months.
- Successfully managed 27 candidates through the program over a three-year period providing a talent base to fill management positions across 300 retail branches.
- Delivered training programs across the country (management skills, technical skills, personal skills)

EDUCATION

Master of Business Administration, Finance, University of LaVerne, 1995

Master of Healthcare Administration, Health Services Management, University of LaVerne, 2002

Bachelor of Science, Business and Management, Finance and Human Resources, University of Redlands, 1989

PROFESSIONAL ASSOCIATIONS

Corporate Executive Board

Healthcare Compliance Association

American Business Women's Association

National Association of Professional Women