Resourceful and meticulous Fractional Chief Financial Officer with 7+ years of experience in optimizing business operations, building & maintaining financial models, and conducting risk assessments. Highly proficient at developing improvement strategies, collaborating with cross-functional teams, and conducting market research. Adept at integrating new technologies, coordinating fundraising and asset allocation, and analyzing financial trends.

**PROFESSIONAL EXPERIENCE**  
FRACTIONAL CFO

*Affinity EMS, San Fernando, CA 2024-Current*

* Build and maintain financial models for the existing operation of the company designed to facilitate future growth and expansion to new geographies. Built and projected financial models for a new venture that will expand the serviceable industry and help to aid expansion. Performed risk analysis and feasibility analysis to determine best steps forward for growth.
* Ran an initial screening of trouble areas to determine High Impact – Low Effort targets that are executable over 90 days. Actionably identified key areas of risk mitigation and growth initiatives. 90-day plan was set to reduce costs by 16%, Reduce days receivable from upward of 60 days to 8 days, Increase revenue by 62%.

FRACTIONAL CFO

*The Sliding Door Repair Company, Anaheim, CA 2024-Current*

* Build and maintain financial models for company monitors and controls. Project future growth to ensure stability while targeting aggressive milestone goals.
* Perform periodic review and sourcing of high impact initiatives to drive company success, Revenue growth, margin expansion, operation efficiency planning, cash flow forecasting. High impact areas drive significant impact to the Income Statement.
* Built team efficiency plan by implementing new company wide operating procedures to maintain a high output workflow that does not place needless burden on employees.
* Developed 90-day strategy plan by conducting risk assessments, identifying high-impact & low-effort mitigation targets and growth initiatives, reducing common sized cost by 21% and increasing revenue by 18%.

MANAGING PARTNER

*Blue Kite Capital, Irvine, CA 2023-Current*

* Raised funds in deal specific special purpose vehicles to enable limited partners to take more control of their VC exposure than with a traditional closed fund.
* Vetted and presented available deals from network and investor syndicate to identify high value investment opportunities for limited partners.
* Capital raised for investment under Rule 506(b).

STARTUP CONSULTANT

*Irvine, CA 2021-Current*

* Consult and analyze startup companies on financial/operational plans and fundraising.
* Build bespoke financial models that allow management to focus on key operations.
* Conduct market opportunity research and advise management on company direction.

INVESTMENT ANALYST

*White Rock Capital, Dallas, TX 2019-2021*

* Researched numerous private companies and public equities in order to find valuable investing opportunities.
* Introduced the company to new investment technologies including retail trading sites.
* Created a trading algorithm that leveraged the present volatility in the market.
* Utilized an extensive network of leading experts in the Bio industry to perform due diligence with the highest level of accuracy.

DATA SPECIALIST

*Indus Capital, San Francisco, CA 2017-2018*

* Built historical 3-statement models by using SEC filings for investment evaluations saving significant time for research analysts.
* Monitored pricing changes and estimated sales to track performance of portfolio companies.
* Researched and compiled data to build and manage the functionality/readability of spreadsheets for analysts and fund managers.
* Tracked social media for actionable qualitative and quantitative data.

**SKILLS**

|  |  |  |
| --- | --- | --- |
| ▪ Business/Industry Analysis | ▪ Financial Planning | ▪ Growth-Stage Businesses |
| ▪ Financial Modeling  ▪ Investment Thesis | ▪ BioTech  ▪ Consulting | ▪ Business Strategy / Development  ▪ Management |

**EDUCATION**

#### MASTER OF BUSINESS ADMINISTRATION 2022 – 2023

University of California, Irvine

BACHELOR OF ARTS – BUSINESS ADMINISTRATION 2018 - 2019

University of California, Irvine