

# Where finance meets *technology*.

Twenty-five years across finance and technology — more than a decade of it at the director and executive level. I led global finance for the entire IT organization of the world's largest gaming & hospitality company and served as de facto CFO of its digital gaming division. I bring that institutional discipline to growth-stage companies, investors, and transactions — fractionally, on retainer, or by project.

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|---------------------------------------|----------------------------------------|---------------------------------------|-----------------------------------------------|-----------------------------------------|-----------------------------------------------|
| <b>25 yrs</b><br>FINANCE & TECHNOLOGY | <b>12+ yrs</b><br>DIRECTOR & EXECUTIVE | <b>\$300M+</b><br>ANNUAL IT PORTFOLIO | <b>\$9B+</b><br>M&A DILIGENCE PRE & POST-DEAL | <b>Big 4</b><br>AUDIT, CONSULTING & M&A | <b>Global</b><br>U.S. • ASIA<br>LATIN AMERICA |
|---------------------------------------|----------------------------------------|---------------------------------------|-----------------------------------------------|-----------------------------------------|-----------------------------------------------|

## SERVICES

01

### Technology Finance & Investment Governance

*ROI and TCO discipline for every technology dollar.*

- ◆ Tech investment analysis (ROI / TCO)
- ◆ Build-vs-buy decisions
- ◆ Data center & infrastructure finance
- ◆ SaaS portfolio review & cost avoidance
- ◆ ERP & financial systems advisory

02

### Fractional CFO & Strategic Finance

*Executive financial leadership without the full-time overhead.*

- ◆ Fractional & interim CFO
- ◆ FP&A — budgets, forecasts & cash flow
- ◆ P&L reviews & unit economics
- ◆ Treasury & cash management
- ◆ Board & investor reporting

03

### AI in Finance

*AI put to work in the finance function — measured, governed, and built.*

- ◆ AI readiness, ROI & TCO assessment
- ◆ Use-case prioritization & roadmap
- ◆ FP&A automation & AI agents
- ◆ AI governance & risk management
- ◆ Build-vs-buy for AI & automation

04

### Valuation & M&A

*Deal support for founder-led, growth-stage, and middle-market companies.*

- ◆ Financial & technical due diligence
- ◆ Business, technology & IP valuation
- ◆ Sell-side readiness & exit planning
- ◆ Post-merger integration modeling

05

### Transactions & Deal Support

*The numbers ready for the room where deals are decided.*

- ◆ Transaction readiness & data rooms
- ◆ Investor-grade financial reporting
- ◆ Deal structuring & negotiation support
- ◆ Cross-border transactions

06

### Risk, Controls & Compliance

*Control discipline built inside global, regulated operations.*

- ◆ SOX design & internal controls
- ◆ PCI DSS, ERM & AML programs
- ◆ Process improvement & streamlining
- ◆ Staffing & org optimization

## HOW WE ENGAGE

- Fractional
- Monthly Retainer
- Project
- Interim
- Expert Calls
- Remote & On-Site**

## WHO WE SERVE

- Growth-Stage & Tech-Forward
- Investors & PE
- Gaming & Hospitality
- Real Estate