

Executive Profile

For over 20 years, David has delivered on a wide-variety of successful outcomes in many areas of global businesses with offices in the Americas, EMEA and Asia Pacific countries. The areas delivered included: change management, ERP system implementation management finance operations, Merger/Acquisition due diligence, equity/debt financing, transfer pricing tax planning, restructuring/integration, revenue recognition, , SEC GAAP reporting controls/regulatory compliance. These results have been executed either through in-house management positions or consultancy to executive management or the Board of Directors. Client size and stage of development has varied from high-growth, fast-paced entrepreneurial companies including, venture backed, newly public or on the cusp of becoming publicly traded companies to established public and private companies in a variety of industries. Industry experience includes: Logistics, Financial Services, SaaS, media, technology, retail, medical device, bio-pharma as well as other startup phase companies.

David's extensive management skills include developing positive working relationships with staff and executive management and Investor Advisors in order to align work streams, operations requirements and financial objectives with desired results achieved through leadership and communication to all team members. In addition, David applies his team management skills by proactively leveraging a combination of project management and hands-on experience to create solutions that meet the business and financial objectives in a collaborative manner.

Professional Experience

Solutions Delivered to Business

Led and participated in over 250 projects that helped companies successfully deploy new strategies as well as implement systems, processes and controls. These projects helped companies achieve their business goals while increasing productivity and profits. Methodologies included adapted from both PwC and IBM.

- Industries with experience include the following: On-line Media OTT Streaming, Digital Advertising/Content Management, Logistics, FDA Regulated, Retail, Telecommunications, Utilities, Software Licensing, Financial Services and SaaS companies.
- Types of solutions implemented include: Accounting/ERP, E-Commerce, On-Line Subscriptions, Warehouse/Inventory, Procurement, Sales Order Fulfillment, Treasury Management, Payroll/Human Resources, Revenue Recognition, Procurement, T&E Management, Business Intelligence and Global VAT/Sales Tax Compliance.
- Project life cycle management experience includes: System Selection, Planning, Design, Configuration, Testing/Quality Assurance, Regulatory Compliance, Change Management, Process Design, Sarbanes-Oxley Compliance as well as Policies, Procedures and Controls.

Finance Leadership

Led and managed a variety of initiatives including restructuring, financing, merger/acquisition, integration, revenue recognition, working capital restructuring, transfer pricing, strategy, financial ERP system implementation management, business process reengineering and other facilitated problem solving. Injected value-added insight and provided "outside the box" thinking on all projects. The ability to lead on the tough issues and projects as well as take calculated risks to meet project objectives and build support and buy-in from project team. Examples include:

- Led finance team of global company focused on providing SaaS based digital advertising, media content management and delivery for over 3000 clients in over 15 countries and 35 entities comprising of over 50 staff. Including all aspects of finance operations.
- Created change management methodology training to project team of over 100 members for integration into the overall finance operations and the ERP including: Financial Reporting, Purchasing, Revenue Recognition, T&E Management, Budgeting, Management Reporting and Controls.
- Provided advice and counsel related to Sales and Use Tax compliance on a multi-state basis.
- Managed and led the financial operations and investment relations for startup emerging business. Investor relations responsibilities included preparing pro-forma financial projections, investor decks and presenting to potential investors and Merger opportunities.
- Implemented global finance operations policies, procedures and controls for a company that included over 10 acquisitions as well as over 30 entities.
- Maintained and expanded relationships with potential investors and investor advisors.
- Provided support to M&A/Dispositions due diligence regarding risk and cost considerations for deal evaluation, US GAAP presentation and cost reserves.

Accounting, Auditing and Controls

Led audit teams at “Big 4” and 2nd tier accounting firms for fast growth public and privately held companies focused on designing programs for reviewing, documenting and addressing accounting, audit and control issues.

- Hired as expert advisor by audit firms Generally Accepted Audit Standards (GAAS) for audits that involve internal controls opinions and technical issues including: revenue recognition, IT systems reliance and analytics. Provided guidance responding to PCAOB audit review comments.
- Evaluated, designed, tested and reported on the global Finance, Entity and IT controls for of global companies.
- Designed, managed and supervised audits and controls of financial audits in accordance with GAAP and provided insightful Management Letter Comments that led audit and compliance streamlined process.
- Led teams to design automated sign-off of key workpapers in the closing and controls compliance process.
- Created segregation of duties conflict matrices for all control cycles. Remediated segregation of duty conflicts and recommended compensating controls as required.
- Led, performed, supervised and reviewed control testing for financial, entity and information technology controls. Reviewed, managed and supervised testing or Sarbanes-Oxley team implementation team members.
- Implemented and advised companies how to design financial reporting, accounting, information technology controls to meet their business, risk and control objectives.

Technical

Operated and implemented a wide variety of technologies, packages from finance, accounting, technology, controls as well as a system selection/implementation perspective. The methodologies employed are a combination adopted from PwC and IBM. Key packages and technologies worked with include: SAP, Oracle, Netsuite, Great Plains, Navision, Peoplesoft, Quickbooks as well as many others.

CAREER HISTORY

TopSpin Management Services, Randolph, NJ July 2005 – Present

- Managing Director/Owner – Provide Consulting, CFO Advisory and Audit Support Services

Media Asset Management Company, April 2013 – January 2015

- Divisional Chief Financial Officer

Piksel, New York, NY and Prague, Czech Republic March 2011 – March 2013

- Senior VP of Finance/Treasurer

IBM, Florham Park, NJ 2003 – June 2005

PricewaterhouseCoopers, NY Metro Region 1993 - 2003

Moore Stephens, Cranford, NJ 1987 – 1993

EDUCATION and CERTIFICATIONS

Certified Information Technology Professional, AICPA

Certified Public Accountant, New Jersey

SAP Internal Auditing

Fairleigh Dickinson University, Madison, NJ - MBA Accounting

Hobart College, Geneva, NY - BA Computer Science

LEADERSHIP ACTIVITIES

- NJ Society of CPA’s (NJSCPA) – Strategic Advisory Committee 2013 - Present
- NJSCPA - Various leadership positions – 1999 – 2012