

# Jay Spencer

## Principal

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For the past 25 years Jay has worked with high-growth, entrepreneurial companies helping them with their finance and accounting needs. He began his career as an auditor with the “Big 4” accounting firm KPMG. From that foundation, he’s been a financial advisor and leader of finance and accounting teams focused on providing insight and understanding of current situations, executing day-to-day on growth plans, and providing financial analysis for decisions along the way.

## AREAS OF EXPERTISE

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### Strategic & Financial Planning

I have extensive experience building financial planning models that align the market opportunity with go-to-market strategies and the resources needed to achieve those goals. A planning model with grounded assumptions for key drivers is critical to attracting capital and giving management a blue print to execute. These plans help identify timing and \$ amount of needed capital and allow management to measure progress and make adjustments where necessary to achieve their goals.

### Financial Analysis & Decision Support

Over the past 20 years I have provided financial analysis to management teams to assist them in making decisions - from big strategic decisions to the decisions managers make on a daily basis. I have led the financial analysis and modeling for merger and acquisition opportunities – on both the buy and sell side. I was responsible for market research, new store sales forecasting and store profitability analysis supporting the expansion strategy at a high-growth national retailer. And I have led the sales and operations planning process and overseen product demand planning.

### Corporate Finance/Cash Management

Cash is the life blood of growing companies. I have experience raising both debt and equity financing. I have helped companies secure and manage credit facilities, supported companies through an IPO and raise capital from private equity and angel investors. Effectively managing the cash you do have is very important and starts with a rolling near term cash flow forecast and good communication internally and with lenders, investors, suppliers and key customers.

## INDUSTRY EXPERIENCE

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Consumer Products  
Retail

Business Services  
Transportation



## EDUCATION

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MA, Accounting  
University of Iowa

BBA, Accounting  
University of Iowa

Certification  
CPA (inactive)

## EXPERIENCE

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Director- Global Demand Planning  
Chamilia

VP- Finance  
Griffin International Companies

VP- Strategic Planning  
Golf Galaxy

Supervising Senior Auditor  
KPMG

## STRENGTHS

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Analytical  
Problem Solver  
Personable  
Client Focused



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