



Jay Spencer

Managing Director

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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

Corporate Finance, Strategic and Financial Planning

Analysis of strategic initiatives and key decisions; Lender, Management and Board Reporting.

Financial Analysis and Decision Support

Reporting and Analytics, Cash Flow management and forecasting, driver-based forecasts and planning models, business insights/KPIs.

Leadership

Connects the finance and operations teams to ensure seamless execution.

INDUSTRY EXPERIENCE

Consumer Products
Retail
Wholesale/Distribution
Food & Beverage

Franchise Operations
Business & Consumer Services
Supply Chain

EDUCATION

MA, Accounting
University of Iowa

BA, Accounting
University of Iowa

Certification
CPA (inactive)

EXPERIENCE

Interim/fractional CFO

Leader Strategic and Financial
Planning Projects

Financial Analysis and Decision
Support

Lender, Institutional Ownership and
Board Reporting

Corporate Finance and Cash
Management

"Big 4" Public Accounting

STRENGTHS

Analytical
Personable
Team-Oriented
Data Drive



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