



Your **Financial Clarity** Partner.

**Finance & Operations Infrastructure
for High-Performance Portfolio
Companies**



What is finity?

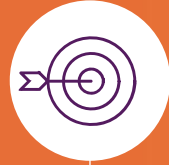
Going beyond traditional fractional CFO services, **we combine CFO-level strategy with COO-level execution** to bridge the gap between planning and performance.

WE DON'T JUST ADVISE.

We build systems, implement processes, and operate alongside your team.

BASIC	GOOD	BETTER	finity 
Bookkeeping	Bookkeeping	Bookkeeping	Bookkeeping
x	Historical Expenses	Historical Expenses	Historical Expenses
x	x	Financial Forecasting	Financial Forecasting
x	x	Management: Reports	Management: Reports
x	x	Accounting	Accounting
x	x	Banking	Banking
x	x	x	Procure to Pay
x	x	x	Tech Stack Improvements
x	x	x	Payroll Support
x	x	x	Quote to Cash
x	x	x	Tax
x	x	x	Legal
x	x	x	Strategy
x	x	x	Compliance

WHAT SETS US APART



We are an **all-in-one finance partner** who offers deep expertise, real results, and direct access to experts on demand.

Depth and Breadth of Expertise

Expertise across finance, accounting, operations, transactions, strategy, and beyond.

Cross-Discipline with Unified Delivery

Coordination of expertise across every stage, creating a unified + customized approach to every challenge.

Direct Expertise on Demand

On-demand team of highly experienced professionals with diverse capabilities.

Tailored Approach

Every aspect of finity's offering strategy, execution, and support is tailored to the unique needs of each client.

Results Oriented

Our clients' results speak for themselves successful exits, hours saved, millions of dollars of value realized.

Tech Forward

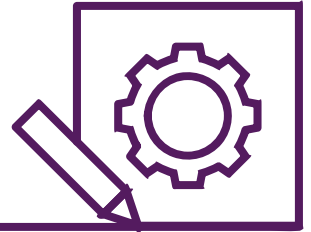
Forward leading financiers with technology and constantly evaluating solutions to solve unique problems.

FULL STACK CFO & COO

We are the end-to-end financial consulting, professional services, and solution implementation platform, offering decades of experience catered to every client's unique needs.



TAILORED APPROACH TO EACH RELATIONSHIP



Unifying our diversity of perspectives across industries and stages



PRE-REVENUE START UPS

Experience in building companies that need basic business functions, tools, and processes.



HYPER GROWTH

Implement software, processes, procedures, and hire for high growth businesses.



Multinational Corporations

Build and manage business functions for large enterprises across a variety of departments and functions.



Investor Perspective

Evaluate businesses as a strategic and financial buyer or investor to guide business operations.

SKILLS & EXPERIENCE

We provide decades of experience spanning numerous industries, products, and functions, offered in a one-stop solution for our clients

FINANCE LEADERS

Finance leaders with decades of experience advising public, private, and sponsor-backed companies on M&A, capital structure, investment banking and strategic growth.

Our team has built and led finance, FP&A, and product operations initiatives by executing at the intersection of managing complexity, applying analytical rigor, and embodying startup agility to scale companies efficiently and maximize valuation.

ACCOUNTING EXPERTS

Our team includes ex-Big 4 audit professionals to enhance strategic project execution across industries, allowing our clients to be audit-ready in advance of needed technical expertise in GAAP accounting and financial operations.

Finity combines insight into the strategic role accounting plays with hands-on leadership and direct technical execution.

OPERATIONS EXPERTS

Finity's operations leaders are experts in data analysis, business intelligence, and process optimization across both high-growth startups and large-scale environments.

The team has experience in leading strategic reporting and performance tracking for enterprise size teams, while also streamlining sales and marketing operations to drive efficiency and accelerate business outcomes.

DATA SCIENTISTS

Led by a doctoral candidate in Computer Science with deep expertise in DevOps, specializing in building scalable infrastructure that enables startups and small businesses to grow and adapt quickly.

Finity pairs deep accounting and financial acumen with hands-on data science to streamline operations, optimize workflows, and solve complex technical challenges.

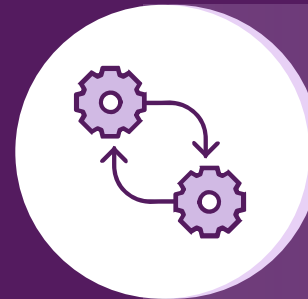
HOW WE WORK AS YOUR PARTNER

We build finance functions like a pyramid: grounded in strong accounting, scaled with analytics, and topped with empowered teams making data-driven decisions daily through a constant, constructive feedback loop.



EXECUTE (Partnership)

Continuously improve reporting, automation, forecasting, and KPI visibility to support management and investor oversight.



START (Action Plan)

Rigorously assess exactly where your organization stands today across people, systems, and processes.



EVALUATE (Desired State)

Outline your exact objectives and long-term goals to ensure complete alignment with your vision.

HOW WE SCALE YOU

01

ACCOUNTING FOUNDATION

Build impeccable financial statements to give your business the essential building blocks to succeed.

02

METRIC & PIPELINE REPORTING

Establish custom metrics, benchmarks, and key performance indicators (KPIs) that accurately capture your unique business drivers and targets.

03

BUSINESS INTELLIGENCE & AUTOMATION

Deploy scalable tools and financial planning roadmaps that automate KPIs and repeatably influence leadership decisions.

04

DATA-DRIVEN DECISION MAKING

Harmoniously pair advanced tools and embedded people to constantly identify operational strengths and actively update your business model.

The Operational
Success Journey

TIM DANSER, CFA

Finance & Operations Leader | M&A |
Capital Strategy | Business Transformation

Google Cloud • Mandiant • Respond Software • Symantec • Oppenheimer • Franklin Templeton
MBA, The Wharton School • CFA Charterholder

Tim brings more than 15 years of experience helping growth-stage, sponsor-backed, and public companies navigate complex financial and operational challenges. His background spans investment banking, corporate finance, product operations, M&A execution, capital raising, and business transformation.

AREAS OF EXPERTISE

Transaction & Capital Strategy

- Mergers & acquisitions
- Capital raising and financing strategy
- Exit preparation and transaction execution
- Capital structure optimization

Finance Leadership

- FP&A and forecasting
- Financial modeling and scenario planning
- Board and investor reporting
- KPI development and performance management

Operations & Infrastructure

- Post-acquisition integration
- Finance transformation
- Process optimization and automation
- Systems implementation and operational scaling

REPRESENTATIVE IMPACT

- Led a \$200M acquisition from transaction process through closing.
- Raised more than \$35M in equity and debt financing.
- Reduced cloud infrastructure costs by 25%, generating \$4M in annual savings.
- Improved month-end reporting from 40 days to 7 days through process redesign and automation.
- Drove product and pricing initiatives that generated more than \$50M in new ARR.



TREVOR YOUNG

Strategy, M&A & Finance Transformation Leader | Private Equity | Corporate Development | Value Creation

Deloitte Consulting • Goldman Sachs • MHC • Finity
MBA, The Wharton School • BSE, University of Michigan

Trevor brings more than 15 years of experience helping private equity-backed, founder-led, and enterprise organizations accelerate growth, execute strategic initiatives, and improve business performance. His background spans corporate strategy, M&A, FP&A, pricing, business transformation, and executive leadership. He has partnered directly with CEOs, CFOs, Boards of Directors, and private equity sponsors to evaluate investments, drive operational improvements, and build scalable organizations.

AREAS OF EXPERTISE

Strategy & Corporate Development

- Mergers & acquisitions
- Acquisition diligence and integration
- Corporate strategy and growth planning
- Capital allocation and investment prioritization

Finance Leadership

- FP&A and forecasting
- Pricing strategy and optimization
- Board and investor reporting
- Financial modeling and scenario planning

Business Transformation

- SaaS migration and business model transformation
- KPI development and performance management
- Operating model design
- Cross-functional execution and governance

REPRESENTATIVE IMPACT

- Led corporate development initiatives spanning acquisition evaluation, diligence, execution, and integration.
- Led strategic initiatives that improved growth, profitability, and enterprise value across a PE-backed software business.
- Directed large-scale business transformation programs supporting recurring revenue growth and operational scalability.
- Built executive reporting and performance management frameworks used to guide investment and operating decisions.
- Advised Boards, executive teams, and private equity sponsors on strategy, M&A, capital allocation, and value creation.



ADAM HANLEY, CPA

CPA | SEC Reporting | GAAP/IFRS | SOX Compliance | Close Optimization

Sojitz Corporation • Dorian LPG • Purdue Pharma • Mitsubishi International • Sojitz Energy
M.S. Accounting, Boise State • B.A. Accounting, Liverpool John Moores • CPA (NY)

Adam is a CPA with nearly 30 years of progressive accounting leadership across public and private companies in the US, UK, and internationally. He is trusted by CFOs and executive teams for building strong finance functions, improving governance, and delivering accurate, timely reporting in complex global organizations.

AREAS OF EXPERTISE

Technical Accounting

- SEC reporting (10-K, 10-Q, 8-K)
- GAAP and IFRS financial statements
- ASC 842 lease accounting and ASC 606
- SOX and JSOX internal controls

Close & Reporting

- Month-end and year-end close processes
- Executive financial packages and KPI analysis
- Subsidiary and statutory reporting
- Budget development and variance analysis

Systems & Leadership

- SAP, Hyperion, NetSuite, SUN, QuickBooks
- VBA automation and Excel macro development
- Team leadership and audit coordination
- Process transformation and outsourcing

REPRESENTATIVE IMPACT

- Cut close timeline from 8 days to 5 days using VBA automation at Mitsubishi.
- Streamlined close and reconciliation processes, saving \$100K in audit fees at Sojitz Energy.
- Led outsourcing of transactional activities, increasing efficiency by 25% at Purdue Pharma.
- Improved JSOX audit efficiency by 20% through internal controls partnership at Mitsubishi.
- Directed accounting operations and SEC reporting for Dorian LPG from 2020 to 2023.



GENESIS MERINO

Marketing Analytics | Business Operations |
Data Dashboards | CRM & BI Tools

Finity • Google • FireEye/Mandiant • Respond Software • BumbleBee Marketing
B.S. Marketing, San Jose State University

Genesis brings 8+ years of experience in marketing analytics and business operations across cybersecurity, SaaS, and financial services. She specializes in building data infrastructure, creating executive-level dashboards, and translating complex metrics into actionable insights for leadership teams.

AREAS OF EXPERTISE

Marketing Analytics

- Campaign and pipeline performance reporting
- MQL scoring and A/B email testing
- Looker, PowerBI, and Marketo dashboards
- Revenue marketing analysis and attribution

Business Operations

- Financial operations management
- Business process optimization
- KPI interpretation and executive reporting
- CRM administration (HubSpot, Salesforce)

Data & Systems

- SQL querying and large dataset analysis
- GCP data migration and management
- B2B SaaS business metrics and reporting
- Marketing tech stack management

REPRESENTATIVE IMPACT

- Migrated Mandiant marketing data tables and dashboards into GCP at Google.
- Delivered high-visibility segmented reporting for Google Cloud Security product teams.
- Built and managed PowerBI and Marketo reporting at FireEye/Mandiant.
- Managed full marketing tech stack (HubSpot, BrightTALK) at Respond Software.
- Currently creating financial reporting and CEO/Board dashboards at Finity.



TREVOR EASTMAN

Finance & Operations Leader | FP&A |
Budgeting & Forecasting | Accounting

InTune Analytics • Trufan (dba Surf) • Eastman Ventures • Odyssey Sports Group • Appliance Shack
MBA & MHA, University of Utah • B.S. Finance, University of Utah

Trevor brings over 12 years of experience in financial operations, modeling, and strategy. He has a strong track record driving financial performance, optimizing accounting processes, and partnering with executive teams across healthcare and technology companies.

AREAS OF EXPERTISE

Strategic Planning

- Financial modeling and forecasting
- Budgeting and FP&A processes
- GAAP compliance and financial reporting
- KPI development and performance metrics

Strategic Planning

- Long-range financial forecasting
- KPI creation and performance metrics
- Cost-benefit analysis
- Capital allocation strategy

Operations & Compliance

- GAAP-compliant financial reporting
- Accounting oversight and controls
- Payroll and bookkeeping management
- M&A support and acquisition integration

REPRESENTATIVE IMPACT

- Led the acquisition of Trufan, Inc., supporting two prior company purchases.
- Managed budgeting and FP&A for Trufan (dba Surf) from 2018 through 2024.
- Built multi-channel revenue forecasting models and KPIs for portfolio companies.
- Oversaw accounting operations and ensured regulatory compliance across multiple entities.
- Served as Interim Director of Finance at InTune Analytics, managing full financial operations.



ANNA WIERZBICKA

Financial Controller | FP&A | Management Reporting | Budgeting & Forecasting

Credit Suisse • LG Electronics • Atlas Estates • UPS
 Master's in Finance Management • FMVA in progress

Anna brings nearly a decade of experience in financial reporting, budgeting, and controlling across multinational environments, including Credit Suisse, LG Electronics, and Atlas Estates. Her background spans IFRS and US GAAP reporting, FP&A, month-end close, and ERP systems including SAP, Oracle, and Hyperion. Anna is a collaborative finance professional known for translating complex data into clear insights for senior management and C-suite stakeholders.

AREAS OF EXPERTISE

Financial Reporting & Business Operations

- Budgeting and forecasting
- Management reporting and KPIs
- Variance and trend analysis
- Bookkeeping

Controlling & FP&A

- Month-End & Year-End Close
- Accruals, Reconciliations & Cost Control
- Financial reporting
- Budgeting and variance analysis
- KPI development and performance management

Operations & Infrastructure

- ERP systems: SAP, Oracle, Hyperion, Quickbooks, Ramp, Rippling, Tableau
- Process improvement and controls
- Cross-functional reporting support
- Tooling implementation and integrations

REPRESENTATIVE IMPACT

- Led FP&A and reporting across multinational business units.
- Delivered P&L reporting and variance analysis for senior management.
- Supported audit readiness, IFRS compliance and financial controls.
- Improved cost transparency through cost center reporting and analysis.
- Nearly a decade of multinational finance and operations experience.



MAX KUZNETSOV

DevOps Engineer | AI | Cloud Infrastructure
| Startup Technology

High-Growth Startups • DevOps • Automation
PhD Candidate, Computer Science

Max is a PhD candidate in Computer Science with expertise in DevOps, cloud infrastructure, AI implementation, and automation. He helps startups build scalable technology platforms, streamline engineering operations, and leverage modern computational tools to accelerate growth.

AREAS OF EXPERTISE

Technology Infrastructure & AI Systems

- DevOps & cloud infrastructure
- AI implementation & automation
- Scalable platform architecture

Technology Leadership

- DevOps & cloud infrastructure
- AI implementation
- CI/CD pipelines
- Workflow automation

Operations & Infrastructure

- Infrastructure scalability
- Platform reliability
- Cloud architecture
- Process optimization

REPRESENTATIVE IMPACT

- Built scalable infrastructure for startups.
- Designed robust CI/CD pipelines.
- Automated engineering workflows.
- Bridged advanced research with real-world implementation.
- Enabled scalable technology operations.



JASON LITVINSKY

Data Science | Machine Learning |
Analytics Engineering | Python & SQL

Cloudera • Sikka Software • OfficeWork Software • Santa Clara University
M.S. Business Analytics

Jason is a recent graduate data scientist with hands-on experience building ML pipelines, training time-series models, and developing scalable data infrastructure. He combines strong technical skills across Python, SQL, and cloud platforms with practical experience at enterprise software companies.

AREAS OF EXPERTISE

Data Science & ML

- LSTM and time-series modeling
- Machine learning (regression, RF, neural nets)
- NLP and text-based classification
- Model evaluation and performance tuning

Analytics Engineering

- ETL pipeline design and optimization
- REST and GraphQL API data ingestion
- SQL, Python (Pandas, NumPy, Scikit-learn)
- AWS (S3, EC2, SageMaker, Lambda, Bedrock)

Data & Visualization

- Tableau and dashboard development
- PySpark and large-scale data processing
- TensorFlow and PyTorch model training
- Business intelligence and reporting

REPRESENTATIVE IMPACT

- Reduced ETL pipeline runtime by 80% at Cloudera through workflow optimization.
- Identified 5,000+ GitHub repositories using custom Python scripts for ecosystem analysis.
- Achieved peak F1 score of 0.8 on healthcare stock movement prediction models.
- Increased sales outreach response rate by 20% through A/B testing at Sikka Software.
- Built multi-agent RAG system integrating GPT-4o Mini, Pinecone, and multilingual embeddings.



Case Study Overview

FINANCE TRANSFORMATION & EXIT READINESS

SITUATION

Following a private equity acquisition, a high-growth SaaS company lacked the financial infrastructure required to support scale, investor reporting, and strategic decision-making. Financial reporting was fully manual, operated on a cash basis, and provided limited visibility into business performance.

CHALLENGE

Leadership lacked reliable insight into customer performance, revenue quality, pricing, discounting, ARR composition, and key operational metrics. The company also faced a two-month close cycle and had no dedicated finance leadership.

ACTIONS

- Transitioned the company from cash-basis to accrual accounting
- Rebuilt financial reporting and revenue analytics infrastructure
- Automated and redesigned the month-end close process
- Implemented dashboards and KPI reporting frameworks
- Led recruitment and onboarding of a full-time finance leader

OUTCOMES

4x → 10x+ ARR Multiple

- Reduced close cycle from ~2 months to 5-7 business days
- Established real-time visibility into ARR, pricing, and revenue quality
- Successfully transitioned to a permanent finance leader
- Supported a successful company exit

Case Study Overview

MANUFACTURING TURNAROUND & LIQUIDITY STABILIZATION

SITUATION

A private equity-backed industrial manufacturer generating approximately \$40M in revenue was operating without a CEO or CFO. Sponsors lacked visibility into cash flow, liquidity, and unit economics.

CHALLENGE

The company faced significant operational uncertainty, limited financial visibility, and immediate liquidity concerns. Leadership required rapid stabilization and a roadmap for value creation.

ACTIONS

- Built a comprehensive cash forecasting model
- Secured a \$5M lending facility
- Developed a dynamic three-statement operating model
- Conducted revenue and compliance forensic reviews
- Established governance and weekly reporting processes

OUTCOMES

- Secured \$5M in operating capital
- Identified \$1M+ in revenue discrepancies
- Extended cash runway by multiple quarters
- Delivered first-ever EBITDA improvement roadmap
- Transitioned company to dedicated turnaround leadership

Case Study Overview

PAYROLL & BENEFITS TRANSFORMATION

SITUATION

A rapidly growing company operating across multiple states faced rising payroll costs, increasing compliance complexity, and administrative burden.

CHALLENGE

Management needed a scalable payroll operating model that could support national expansion while reducing costs and improving employee experience.

ACTIONS

- Evaluated alternative payroll operating models
- Selected and negotiated a PEO solution
- Managed full payroll and benefits transition
- Streamlined multi-state compliance administration
- Implemented scalable payroll infrastructure

OUTCOMES

- Reduced payroll costs by \$66K per pay cycle
- Reduced annual healthcare costs by \$172K
- Increased employee take-home pay by ~5%
- Simplified nationwide hiring and compliance
- Created scalable payroll infrastructure for growth

Case Study Overview

FINANCE AUTOMATION FOR A VENTURE-BACKED CYBERSECURITY COMPANY

SITUATION

A cybersecurity startup had recently raised \$15M in funding but the CEO remained heavily involved in payroll, accounting, reimbursements, and finance operations.

CHALLENGE

Founder time was being diverted away from growth and product execution due to manual finance processes and operational inefficiencies.

ACTIONS

- Automated payroll and reimbursement workflows
- Implemented vendor payment and invoicing processes
- Streamlined accounting and close procedures
- Activated underutilized software capabilities
- Managed multi-state compliance requirements

OUTCOMES

- Eliminated 5-10 hours of weekly founder administrative work
- Reduced finance operating costs by approximately 5x versus internal alternatives
- Automated payroll, reimbursements, invoicing, and bill payment
- Improved scalability without adding headcount
- Allowed leadership to focus on growth initiatives



Reach out to let us help you find
financial clarity for your business
www.finitynow.com