

Michael DeBoard, CPA, MBA

Accounting & Finance Executive

San Francisco Bay Area

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SUMMARY

Financial executive with 15 years of experience as an operational leader driving all aspects of the CFO office for venture-backed portfolio companies and family-owned businesses. Intentional about building trusted relationships through creative solutioning and storytelling with stakeholders. A team leader invested in growing talent and team culture to foster a positive and effective working environment.

DIFFERENTIATED SKILLS

- Team leadership, coaching and talent development
- Financial package preparation and presenting
- Scenario planning and financial strategy storytelling
- Performance and budget management of teams
- Data-driven financial modeling and forecasting
- Basic SQL reporting and business analytics
- Process design, implementation and improvement
- Operations management and cost reduction

EDUCATION

Santa Clara University Leavey School of Business

Santa Clara, CA
November 2016 – December 2018

- **Master of Business Administration (MBA)**

Santa Clara University Leavey School of Business

Completed July 2013

- **Certificate of Advanced Accounting Proficiency**

Pepperdine University Graziadio School of Business

Malibu, CA

August 2006 – July 2009

- **BS in Business Administration**

EXPERIENCE

StrategyPlus Finance, LLC

Founder, Financial Services & Strategic Advisory

San Jose, CA

January 2024 – Present

- **909Cyber, Inc. - Fractional CFO**
Partnering with the CEO of a \$5M IT and security services firm to prepare for scalability through rapid growth by managing cash flow planning and strategy
- **Lumenuity, Inc. - Fractional CFO**
Leading accounting & financial reporting at a hardware and SaaS platform company including a strategy to close \$5M in Seed funding with family offices
- **AmeriCare SF, LLC - Fractional CFO**
Collaborating with the CEO and the management team to scale a franchised Bay Area caregiving services platform from \$3M to \$15M in revenue growth
- **IMOS Consulting, Inc. - Fractional CFO**
Strategic partner with the Owner and President at a family-owned digital marketing company to scale to \$10M in revenue and with an exit strategy
- **Cadents, Inc. - Fractional Accounting & Finance**
Partnering with the CEO and CFO of a SaaS IT and security services company to build accounting operations & reporting and support their strategy to close Seed funding with “strategics” and family offices
- **Bay Angels - Membership Chair, Startup Mentor and Advisor**
Partner with an exclusive community of startups and investors to provide advisory services to companies receiving funding and build investor rapport

MarketNation, Inc.

VP of Finance, Controller

Campbell, CA

May 2020 – January 2024

- Founding team member of a DTC Retail/eCommerce SaaS platform leading all accounting and finance operations owning all financial modeling, budgeting, and presentation of financial analysis of the business
- Owned key external stakeholder relations with the CEO and COO and the investor planning strategy from Seed to Series A including raising investment of \$7M in Seed funding from 40 high net-worth individuals
- Created the objectives & key results (OKRs) framework from scratch for the company to manage cross-functional alignment with the CEO in weekly business reviews (WBRs) for positive operational influence

Meta, Inc. (fka Facebook, Inc.)

Consultant, Revenue Operations

Menlo Park, CA

January 2020 – May 2020

- Partnered with cross-functional teams to advise projects were within expected scope of revenue operating requirements and performed on-time
- Reviewed and approved financial due diligence on partnering brand contracts for publishers with the company deal team to ensure accurate reporting
- Led the monthly and quarterly publisher revenue reporting process for the company in partnership with cross-functional leaders

CERTIFICATIONS & COURSEWORK

**Cornell University
SC Johnson School of Business**
Completed May 2020

- **Certificate of Alternative Investments and Asset Management**

**Santa Clara University
Leavey School of Business**
Completed July 2017

- **Lean Six Sigma Supply Chain – Yellow Belt**

**Department of Consumer Affairs
California Board of Accountancy**
Completed December 2016

- **Certified Public Accountant (CPA), Active License #131623**

EXPERIENCE (continued)

Valley Agricultural Software, Inc.
Head of Finance, Controller

San Jose, CA
February 2019 – January 2020

- Drove financial operations for a mid-size AgTech SaaS company with \$50M in revenues working closely with the parent holding company which reported \$500M in annual revenues operating in Canada, United States, and Europe
- Reduced the monthly close time down to three days after recovering and repairing historical financials which allowed for more timely delivery of the monthly financial package to management and the parent holding company
- Drove annual budgeting for the company managing a budget across eleven departments while supporting consolidated budgeting with the parent company across additional entities working with internal stakeholders
- Led the financial modeling of a co-operative initiative with the CEO building a consumer data platform with Nestle & Land O'Lakes closing \$1.2M in funding for the project, creating a projected new revenue line of \$7M by year five

Frank, Rimerman + Co. LLP

San Jose, CA

CFO Advisory, Venture Capital Portfolio Companies March 2017 – January 2019

- Managed a team to complete the monthly close, financial reporting and financial packages with management to drive financial strategy for venture-backed technology startups across various industries
- Automated processes and workflows using NetSuite, QuickBooks, Intacct, Expensify, Tallie, Tableau, Bill.com, Google Cloud, various payroll platforms such as ADP & TriNet, and Excel pivot table modeling
- Supported the management team preparing various FP&A models on different clients not limited to software contract bookings, revenue in accordance with ASC 606, invoicing and cash analysis, and general operating models

Moss Adams LLP

Campbell, CA

Consultant, Venture Capital Tax

August 2015 – November 2016

- Managed venture capital tax engagements to complete returns, international forms, and K-1 investor allocations
- Created Excel models from client data to calculate tax liabilities supporting client positions with proper citing

Deloitte LLP

San Jose, CA

Consultant, Private Equity Tax

July 2013 – July 2015

- Managed private equity tax consulting engagements ensuring compliance with Federal & state taxing authorities
- Completed consolidated corporate tax returns including multi-state tax activity with exposure to international law

Anritsu, Inc.

Morgan Hill, CA

Supply Chain Manager, Contract Manufacturing (CM)

May 2012 – June 2013

- Led weekly team meetings at the CM and oversaw production to ensure delivery deadlines were met
- Presented quarterly performance to joint teams between the company and CMs to meet business objectives