

## (OLD LinkedIn headline, summary, current work experience:)

David Garcia  
Finance Executive  
San Francisco Bay Area

### **SUMMARY:**

Progressive, innovative, and highly analytical executive with expertise in financial planning, forecasting, SaaS technology, M & A analysis, and IPO preparation. Driver for efficiency in financial operations and proven success in building long-term business partnerships to support the strategic direction and vision of multibillion-dollar organizations. A trusted advisor, passionate about building high-quality teams and delivering accurate results.

### **CORE AND TECHNICAL SKILLS:**

Financial Forecasting | Cross-Functional Team Leadership | FP&A | Oracle Planning + Budgeting Cloud | Hyperion Financial Management | Market + Competitor Research | Accounting | Project Management | Fundraising | IPO Process Experience | Auditing | Mergers + Acquisitions | Building Relationships | MS Office Suite | Compliance

### **Current Experience**

View | Dynamic Glass  
V.P. Finance  
2017 - 2020 (3 years)  
Milpitas, California, United States

- Key leader in closing \$1.1B in equity financing; pitched to potential investors, led the financial diligence process, and closed the transaction at an increased valuation
- Built and enhanced a cash forecasting process which improved accuracy by 10% quarterly and enabled the company to eliminate non-essential spending
- Created and implemented a manufacturing cost model resulting in improved forecasting accuracy by 10% Intelepeer

### **Prior Experience**

V.P. Finance, Corporate Controller  
2011 - 2017 (6 years)  
San Mateo, California, United States

- Aligned sales and marketing, operations, and finance teams to streamline processes for forecasting and tracking SaaS metrics

- Facilitated a strategic decision to acquire a 40-person organization as part of a financial transaction that added over \$15M of annual recurring revenue and increased total company gross margin by 7%
- Developed, analyzed and presented to senior leadership the annual budget and three-year projections used for the IPO preparation process; included collaboration with bankers and auditors to build the model

#### Align Technology

Director of Financial Planning and Analysis

February 2001 - 2011 (10 years)

San Jose, California, United States

- Built the finance infrastructure to support sales revenue growth from \$20M to over \$500M annually and operating margins from negative to over 25%
- Steered the company's financial models for quarterly guidance; met or exceeded expectations over 90% of the time
- Promoted from Sr. Manager FP&A to drive corporate development, build team capabilities, and inform strategic decisions in long term planning

#### Oracle

Sr. Analyst, Financial Review Services

1999 - 2001 (2 years)

Redwood Shores CA

#### Deloitte

3 years

Senior Accountant

1998 - 1999 (1 year)

San Francisco CA

Staff Accountant

1996 - 1998 (2 years)

San Francisco CA

#### Education

Stanford University

Bachelor of Arts - BA, Economics

The Wharton School

Master of Business Administration - MBA, Finance

## **NEW** LinkedIn headline, summary, current work experience:

### **Headline:**

Finance Executive assisting CFOs & CEOs with strategic & financial leadership for over 15 years | Operational efficiency | SaaS | Team building | Compliance | Accounting & SEC reporting | M&A | IPO | Fundraising

### **About:**

For over 15 years I've supported and advised CFOs and CEOs for mid-sized to large technology companies. With deep business acumen and accounting expertise, I'm a reliable and insightful right-hand for the C-suite.

As both the finance expert and strategist, I have served both public and private companies with reliable financial information and projections that the C-suite has relied on for their decision-making. As one of my key responsibilities, I keep the company funded optimally for growth.

Confidence, comfort and trust are what the C-suite experiences from my support.

I have a passion for figuring out how to drive revenue, profit, and cash flow, and for building teams and processes. I am highly experienced in financial planning & analysis, M&A analysis, IPO and auditing.

- FINANCIAL AND OPERATIONAL EXPERTISE: I created a “well oiled machine” quarterly reporting process for public earnings. I also led multiple systems implementations that increased efficiency and accuracy. Proficient with MS Office Suite, Host Analytics, Oracle PBC.

- STRATEGY: I aid C-suites with strategic financial advice in both day-to-day decisions and at pivotal turning points for a company's growth. Leadership often finds my input indispensable. For example, I presented to the C-suite financial models and projections that led to an acquisition resulting in increased profit margin and cash flow.

- BUSINESS TRANSFORMATION: I spearheaded the transformation to a SaaS business model for a telecommunications company. I led in designing the product and the billing operations and defining the KPI metrics for forecasting and reporting. Consequently, we secured \$10M equity funding.

- FUND RAISING: As the lead finance executive, working with the CEO and CBO, we raised over \$1.5B in both debt and equity. I walked the investors, such as Softbank, through all financial information, the business model, projections and assumptions.

I am a team builder. I earn the trust of my own team and cross-functional teams with integrity and principles. I go deeper to communicate, ask questions and understand the true issues beneath the surface. I stay calm under pressure and increase my focus.

I am results-oriented, self-motivated, passionate, easy to work with and fun. I am competitive and have a deep desire for the company to win.

I also enjoy golf, snowboarding, playing guitar and piano and coaching my daughter in basketball.

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## **Current Experience:**

In addition to safeguarding corporate financial health, projecting financial forecasts, and performing compliance duties as a trusted advisor to the leadership, I am also passionate about building high-quality teams, nurturing relationships internally and externally, and delivering results. I am growth minded, innovative, highly analytical and emotionally intelligent. I put processes in place that save cost and drive efficiency. I was promoted from V.P. of Financial Planning & Analysis to lead the manufacturing team, and to spearhead fund raising efforts.

- I built and enhanced a cash forecasting process which improved accuracy by 10% quarterly, enabling the company to eliminate non-essential spending. I also created and implemented a manufacturing cost model (COGS) resulting in improved forecasting accuracy by 10%.

- I led in closing a round of \$1.1B equity financing. I also led closing of over \$350M in debt financing which funded the expansion of manufacturing operations for future growth. I pitched to potential investors, led the financial due diligence process, and closed the transaction at an increased valuation that far exceeded expectations. The CEO said: "That is some of the best work I have seen. We would have never got it done without you."

- I expanded the corporate and manufacturing finance team capability and output by streamlining processes, hiring new talent, reorganizing roles and providing training and mentorship in those new roles.

- I spearheaded the financial cost analysis, supply and demand analysis, and ROI evaluation to support the strategic growth decision.

Additionally:

- Assisted in implementing ASC 606 revenue recognition and presented to the Audit Committee for approval.
- Spearheaded 409A valuation process for Board and Audit Committee approval.
- Led Finance team in IPO workshops and project plans to assess Public Company readiness.
- Proficient with Oracle PBC.