



8020

CONSULTANT BIO

MIKE LANCIA, MBA, CFA

Experience: 25+ Years

Expertise:

- Financial Planning & Analysis
- Financial Modeling
- Due Diligence & Transaction Support
- Business Valuation
- Strategic Planning

Key Achievements

- Developed 3-statement, 5-year forecasting model for e-commerce company as part of sale process and bridge financing, providing key inputs for investment memorandum and management presentation
- Created 3-statement budget model for multi-location outdoor living systems designer with detailed P&Ls and KPIs by location and region plus overall company balance sheet and cash flow forecast
- Built financial model for Law firm to determine optimal marketing channels, guiding future spending decisions and supporting additional marketing funding acquisition

Technology Proficiency

- NetSuite
- Tableau
- Capital IQ
- Anaplan
- JD Edwards

Education

- Pepperdine University, Graziadio School of Business – MBA, Finance & Entrepreneurship
- Brock University – BA, Economics & Finance (Double Major)
- Chartered Financial Analyst (CFA)

Previous Employers

- McGladrey Capital Markets
- Union Bank
- Elements Behavioral Health
- Morgan Joseph & Co.
- First Asset Management



LinkedIn Profile:

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