



PSM Advisory Services

Execution That Delivers

PROFESSIONAL BACKGROUND

CFO partner to growth-focused CEOs and PE-backed operators. Delivered a \$180M exit at 11x EBITDA, executed \$60M+ in strategic M&A, and raised \$30M+ in institutional equity. Delivers investor-grade discipline, scalable systems, and cash clarity—without slowing execution.

INDUSTRY EXPERIENCE

- Technology & SaaS
- Life Sciences & Pharmaceutical CDMOs
- Manufacturing & Consumer Goods
- Professional & BPO Services
- Telecommunications
- Education

SOFTWARE & TOOLS

- ERP: Oracle, SAP, Dynamics, Hyperion
- Analytics & BI: Power BI, Tableau
- Modeling: Cash Burn Rate & Forecasting
- Programming & Data: Python, SQL, VBA
- Platforms: Solution design & automation

EDUCATION AND CERTIFICATIONS

- MBA Accounting, Rochester Institute of Technology
- Certified Lean Six Sigma Black Belt, Syracuse University
- Digital Transformation & Platforms, Dartmouth College

Andrew Bonanni, CFO



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PROFESSIONAL EXPERIENCE

PSM Advisory Services — Founder | 2018 – Present

Industry: Advisory / Professional Services

Delivers CFO strategy and execution support to SMB and PE-backed companies, improving cash clarity, capital readiness, and investor confidence.

Dataport Solutions — EVP, CFO | 2010 – 2018

Industry: Technology / Manufacturing

Scaled finance infrastructure, secured Series A&B funding, and prepared companies for strategic acquisition.

Wireless Channels — President & COO | 2007 – 2010

Industry: Telecommunications

Drove operational turnaround and margin expansion, positioning company for a profitable strategic exit.

The Princeton Review — EVP, CFO & Corporate Treasurer | 2005 – 2007

Industry: Education / Test Prep Services

Strengthened governance and capital structure, enabling growth while supporting a PE-led transition.

Bowne Business Solutions — SVP & CFO | 2002 – 2005

Industry: Business Process Outsourcing (BPO)

Drove growth and full integration of BPO that culminated in a \$180M strategic sale at 11x EBITDA.

Gartner — Managing VP, Worldwide Finance & Corporate Reporting | 2000 – 2002

Industry: IT Research & Consulting

Managed global finance resources and enterprise strategy; negotiated multi-year contracts and built scalable, investor-grade reporting.

Xerox Corp. — Pricing, Global Strategy, U.S. Controller | 1991 – 2000

Industry: Technology Manufacturing / Business Services

Oversaw a multi-billion P&L, secured multi-year client agreements, and led a reporting transformation recognized by the XBS Malcolm Baldrige committee.

AREAS OF EXPERTISE

- **Strategic Finance & Capital:** M&A, capital raises, debt restructuring, JVs
- **Finance Transformation:** Strategy, assessments, process improvement
- **Governance & Risk:** SOX, pricing, ERP/EPM
- **Data & Analytics:** ERP integration, BI, AI-enabled forecasting, modeling

