



## PSM Advisory Services

Execution That Delivers

### PROFESSIONAL BACKGROUND

Strategic CFO for PE-backed, public, and founder-led companies. Delivered a \$180M exit (11x EBITDA), \$60M+ in M&A, \$30M+ in equity funding, and Big Four-ready controls; modernized finance with AI, predictive modeling, and ERP/BI.

### INDUSTRY EXPERIENCE

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

### 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

*Delivered 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 B capital, and prepared company for strategic acquisition.*

#### Wireless Channels — **President & COO** | 2007 – 2010

Industry: Telecommunications

*Drove operational turnaround and margin expansion, positioning for 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 that culminated in a \$180M strategic sale at 11x EBITDA, strengthening operations and positioning for exit.*

#### 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

