

The Problem: Raising capital is often seen as a rite of passage and a badge of honor for high-growth companies, but too many entrepreneurs waste precious time and resources chasing money that never materializes. Why? They lack a targeted capital strategy and a proven process for fundraising, which are built on the solid foundation of financial expertise and early stage investors' mindset.

STEPHANIE'S PERSPECTIVE:

Fundraising is like marketing – you need a compelling value proposition, a clear strategy, a well-defined ideal client and a repeatable process. Unfortunately, plenty of entrepreneurs leave all aspects of their fundraising to chance.

I give CEOs the financial knowledge, skills and investor mindset that not only sets the company up for successful early stage fundraising, but also positions the company to impress larger institutional investors and potential acquirers.



HOW THIS SHOWS UP IN YOUR BUSINESS:

If you find yourself:

- Letting your team / accountant “handle” the numbers
- Dreading conversations with lenders and/or investors – either current or potential
- Anxious to grow but unsure that you have all the data you need to make good decisions
- You could benefit from improving your financial foundations and adopting an investor mindset.

STEPHANIE'S CORE COMPETENCIES:



Activity-based financial projections - ensure actionable projections by connecting day to day activities to KPIs



Capital Strategy - design a capital stack that fits the company's growth plan while minimizing the cost of capital



Strategic Financial Advisory - provide entrepreneurs with investor perspective and strategic implications of key decisions

STEPHANIE'S CAREER HIGHLIGHTS:

- Over \$5B of investment banking transactions in US and Europe
- Over \$30M of early stage capital raised Exit to a publicly traded (FTSE-250) UK company
- Frequent speaker for national organizations and small business events
- Startup advisor, mentor, author and podcast host



The Financial Team That Empowers You