



## Casey McGarity

### Qualifications Summary

Senior financial professional with operations and strategic focus on small and medium sized businesses (\$10-50M) in a broad range of environments including manufacturing, engineering services, SaaS, and nonprofits. Highly experienced in financial modeling, budgeting, reporting, managerial accounting, tax strategy, business investment planning, and process improvement, with the ability to understand and communicate connections through all functions of the enterprise.

### Professional History

Various Companies	Finance and Strategy Consultant	2017 – 2018
Fives Lund LLC	CFO (post-acquisition)	2015 – 2016
Lund Engineering Inc.	CFO (pre-acquisition)	2011 – 2015
Kvichak Marine Industries	Product Development and Proposal Manager	2004 – 2011
U.S. Navy	Nuclear Submarine Officer	1995 – 2001

### Accomplishments

- With Fives Lund, established policies and procedures to integrate with the Fives Group (\$1.8B sales), with significantly increased financial reporting and operational harmonization, while transitioning between GAAP and IFRS standards.
- Actively managed all aspects of Lund Engineering's 2 separate M&A processes including investment bank selection, forecasting, potential investor communications, due diligence, and purchase and sale agreement negotiations.
- With Lund Engineering, led a 2-year expansion of the company's design-build business model with the purchase of a \$2.9M commercial property, >\$3.4M capital investments, and driving the development of the company's assembly and operations staff during while doubling company revenue.
- Established or significantly overhauled Lund's revenue recognition procedures, depreciation schedule, insurance policies, line of credit, ERP system development, export control and licensing, overhead and burden rates, proposals management and tracking, project tracking, legal reviews, contract negotiations, and various strategic alliance opportunities.
- Implemented tax strategies with numerous professional resources to directly reduce tax burden (including multiple years of refunds) by >\$4.8M, including R&D credits, IC-DISC structures, and WA state B&O reclassifications and credits.
- With Kvichak, actively managed all aspects of >\$315M of proposals and product development, winning 18 significant contracts for \$105M.
- As an officer in the Navy, served as senior operations officer on a submarine, and supervised a division of instructors teaching nuclear physics.

### Education and Certifications

- Bachelor of Science in Control Systems Engineering, United States Naval Academy
- Master of Business Administration, University of Michigan Business School