

DAVID SPACEY



QUALIFICATIONS SUMMARY

SMB and lower-middle-market CFO and Controller delivering cash certainty, clean month end, lender-ready reporting, profitability discipline, and rigorous budgeting and forecasting. Able to lead M&A and post-acquisition transitions when needed. Builds 13-week cash and working-capital playbooks, annual operating plans and driver-based rolling forecasts, board and sponsor-grade KPI packs, pragmatic AP, AR, and close controls that owners use. ERP and systems work includes end-to-end integrations and upgrades across Oracle, NetSuite, Sage Intacct, QuickBooks, Bill.com, and domain tools such as COA and segment design, approvals, roles, item masters, and reporting. Fractional, interim, and project based.

PROFESSIONAL HISTORY

CFO Selections	Consultant (Fractional CFO and Interim)	2025 - Present
Goodwill Industries of Alberta	Interim CFO and Finance Director	2025
Thompson Group and HTG Construction	Interim CFO	2024 - 2025
7-Eleven Distribution (SEDCC)	Finance Executive Consultant, Systems to Systems Integration	2025
Mint Health and Drugs	Fractional and Interim CFO	2025
Spacey Advisory Group LLC	Managing Member and President	2025 - Present
ETF Global Advisors	Founder and CFO, Projects	2019 - Present

ACCOMPLISHMENTS

Operating CFO outcomes

- Installed a 13-week cash and weekly receipts and disbursements rhythm. Aligned terms, billing cadence, and inventory mins and maxes to liquidity targets.
- Built the annual operating plan and department budgets. Connected driver-based models to a rolling forecast with budget versus actual analysis and variance bridges.
- Established a monthly performance cadence with KPI tiles, flash packs, and forecast updates so leaders make faster, fact-based calls.
- Created unit economics and job or project margin views to drive pricing, bid or no-bid, and mix decisions that protect gross margin.

M&A and Systems outcomes

- Led post-acquisition transitions including finance day one and day two, conveyance and assignments, naming, and lender communications to reduce execution risk.
- Drove ERP and reporting upgrades across Oracle, NetSuite, Sage Intacct, QuickBooks, and domain systems. Work included COA and segment strategy, roles, approvals, item masters, and management reporting.
- Stabilized procurement and testing during ERP rollout. Stood up traceability, UAT plans, and role-based training without disrupting operations.

LICENSES & EDUCATION

- M.S., Finance, Boston University
- B.A., Economics, University of Massachusetts- Boston