

Susan Echard

SeatonHill Partner

CORE COMPETENCIES

CFO • Private Equity • Mergers & Acquisitions • Auditing • SEC Filings • Strategic Planning
• Financial Modeling • Consolidation • Leadership • B2B • Due Diligence

EXECUTIVE PROFILE

Susan Echard is a partner in the Phoenix office of SeatonHill. She has over 35 years' experience within Big Four and CFO roles and has conducted large-scale financing and SEC filings with numerous companies, including Royal Caribbean Cruise Lines, Tupperware, PetSmart, and CSK Automotive (now O'Reilly Auto Parts). She has successfully raised over \$250 million in private equity, facilitated over \$300 million in credit, and spearheaded two company exits. Key areas of expertise, both domestic and internationally, include extensive M&A exit strategy planning and execution, FP&A modeling, budgeting, cash management, and team management. Susan led the implementation of ERP, accounting, and tax compliance platforms such as Netsuite, Intacct, Concur, Adaptive Planning, and Alvara. She has normalized the accounting functions of many organizations through the consolidation of disparate reporting systems and the establishment of effective metrics and KPI reporting. Susan is highly experienced in HR policy development, including recruiting and onboarding, corporate Insurance policies, employee benefits, and 401(k) programs.

KEY ENGAGEMENTS

Trinity Capital: As **CFO** for this specialty lending company focused on providing senior secured loans and equipment financings to growth stage companies, Susan led SEC filing efforts, managed press releases, and conducted quarterly investor calls. She raised \$250 million in private equity and debt offerings and \$300 million in credit that paid off SBA loans and enabled the buyout of existing LPs, allowing for a conversion to BDC funding. Susan implemented strong internal controls and compliance policies and procedures, in addition to managing HR, benefits, and company insurance plans.

Beyond Trust: As **Corporate Controller** for this \$100 million private equity backed SaaS developer of endpoint security software, Susan was responsible for monthly financial statements, annual audits, tax compliance, R&D credits, statutory filings, and transfer pricing agreements. She reorganized accounting functions to integrate with company acquisitions, and streamlined intercompany agreements, banking protocols, and transfer pricing. Susan led the consolidation of 3 accounting systems into 1 platform (Intacct), which redefined GL and streamlined accounting processes. She also implemented an automated tax compliance software platform (Avalara) to resolve sales tax issues, VDAs, and deregistered/registered states.

AFS Technologies: As **Corporate Controller** for this leading global provider of SaaS software solutions purpose-built for consumer goods companies and distributors, Susan was responsible for worldwide accounting, accounts receivable/payable, general ledger, payroll, and financial planning and analysis. She led the acquisition of 2 international software companies in China and Slovakia, streamlined treasury and cash forecasting, and provided weekly/monthly reporting and analysis to the company's private equity partner. She also implemented Concur and Adaptive planning platforms to establish new budgeting and travel and expense processes.

Lumension Security: As **VP, Worldwide Controller** for this venture capital backed \$60 million global leader in endpoint security software solutions, Susan managed entities in the U.S., Luxembourg, UK, APAC, and Ireland, where she provided financial statements, audits, taxes, statutory filings, third party accounting, and maintained banking relationships.

EDUCATION & CERTIFICATIONS

BBA Accounting • University of Michigan-Flint



SELECT EXECUTIVE EXPERIENCE

Trinity Capital [2019-2021]
CFO

Cubex LLC [2017-2019]
CFO

DataShield, LLC. [2016-2017]
CFO

CONTACT

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