

ADAEZE OKONKWO, CPA

DIRECTOR OF FINANCE | FP&A & CORPORATE DEVELOPMENT

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Finance leader who makes the numbers tell a story the whole leadership team can act on.

EXECUTIVE PROFILE

CPA and MBA with 16+ years of finance experience, including six years directing finance at a \$450M healthcare services company. Partner to the CEO and board with a record of leading \$120M in acquisitions, building a 14-person team, and delivering \$9M in annual savings. Positioned to lead financial strategy and scale operations as a VP Finance or CFO at a mid-sized, growth-stage company.

PROFESSIONAL EXPERIENCE

Director of Finance (FP&A and Corporate Development)

Carolina Health Partners

Apr 2020 - Present

- Led financial due diligence and integration for three acquisitions totaling \$120M, adding \$85M in annual revenue.
- Built a 14-person finance team and reduced the monthly close from 12 days to five.
- Present quarterly results and the annual plan to the board; lead the company's \$450M annual budget process.
- Identified \$9M in annual savings through vendor consolidation and improved staffing forecasts.

Senior Finance Manager

Bluewater Logistics

Jun 2014 - Mar 2020

- Owned planning and forecasting for a \$300M business unit, improving forecast accuracy to within 2%.
- Built pricing models that improved margins on the company's largest contracts by three percentage points.
- Promoted twice in six years; managed a team of five analysts.

Senior Auditor to Audit Manager

Hartwell & Brooks LLP

Sep 2009 - May 2014

- Led audits for 10+ healthcare and manufacturing clients, managing teams of six.
- Trained 20+ new auditors through the firm's onboarding program.

SELECTED LEADERSHIP INITIATIVES

- **Acquisition Integration Playbook:** Created a repeatable 100-day plan used across three acquisitions, reducing integration time by 40%.
- **Finance Systems Modernization:** Moved the company from spreadsheets to NetSuite and Adaptive Planning, saving 1,200 staff hours annually.
- **Board Reporting Redesign:** Rebuilt the board package around 12 key metrics; earned praise from the board chair.

EDUCATION & CREDENTIALS

MBA, Duke University Fuqua School of Business | 2014

B.S. in Accounting, University of North Carolina at Chapel Hill | 2009

Certified Public Accountant (CPA), North Carolina

BOARD, COMMUNITY & RECOGNITION

Treasurer, Charlotte Youth Literacy Foundation | 2021 - Present

Mentor, Women in Finance Charlotte | 2019 - Present

Charlotte Business Journal "40 Under 40" | 2022

TECHNOLOGY

NetSuite | Adaptive Planning | Advanced Excel | Power BI | Tableau