

SETH D. SOKOLOFF

CFO & FINANCE TRANSFORMATION LEADER

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SUMMARY

CFO and finance transformation leader building scalable finance functions in PE-backed and high-growth businesses, with experience at companies backed by Kelso, General Atlantic and Thoma Bravo. Partners with executives, sponsors, Boards and lenders on FP&A, operating performance, liquidity, acquisition integration and M&A. CFO experience includes supporting growth to approximately \$40M in run-rate revenue and negotiating an \$8M financing facility; private equity investing experience includes sourcing an investment that achieved 3.8x MOIC. Combines hands-on leadership with advanced analytics and applied AI.

EXPERIENCE

GALLOWAY (KELSO & COMPANY / ARA SERVICES PARTNERS)

Remote

FP&A Consultant

2026 – Present

Acquisitive \$100M+ architecture & engineering platform with 50+ profit centers.

- Lead FP&A planning, reporting, and decision support with the CFO, executives, Kelso and ARA; built FP&A infrastructure to support acquisition-led growth
- Built a Monthly Reporting Package recognized by Kelso as best-in-portfolio, expanding visibility across business units; built the Value Creation Plan KPI package adopted by ARA as a model for other portfolio companies
- Integrated five acquisitions into reporting, including acquisition performance tracking and organic / pro forma P&L views; supported Board reporting, lender diligence and recurring lender reporting
- Developed weekly dollar-based utilization reporting used by leadership to manage utilization and labor margin; directed an external Power BI team to deliver an automated weekly dashboard
- Built a Power BI dashboard using AI to support business development resource allocation; developed reusable AI workflows for QoE rollforwards, backlog analysis, and Monthly Reporting Package commentary

ACES (GENERAL ATLANTIC)

San Diego, CA (Remote)

FP&A Consultant

2024 – 2025

\$175M national healthcare provider focused on treating children with autism.

- Led key components of the 2025 budget process and transitioned the 80-location budget from Excel to Adaptive Planning; CAO called it the best budget process in his 10 years at the company
- Developed facility-expansion models and scenario analyses, securing approvals for five strategic relocations and expansions
- Replaced one-week cash-out forecasting with a 13-week cash forecast projecting receipts by payer; trained the assistant controller to maintain the model
- Delivered the Monthly Reporting Package in the fastest cycle in company history, providing actionable insights into financial, operational, and cash flow metrics

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HEYTUTOR

Los Angeles, CA (Remote)

Chief Financial Officer

2021 – 2023

National EdTech company providing tutoring through proprietary technology and curriculum.

- Built the finance function, hired a controller and led budgeting, reporting, cost management and margin analysis through 823% revenue growth to approximately \$40M in run-rate revenue in two years; established a 13-week cash forecast to anticipate receivables funding needs and seasonal liquidity troughs
- Negotiated an \$8M invoice financing facility bridging tutor payroll and school-district collections, reducing projected interest expense by approximately \$2M and limiting equity dilution

D.C.-BASED HEALTHCARE PRACTICE

Washington, D.C. (Remote)

Fractional CFO

2022 – 2024

Mental health and nutrition practice with over 30 healthcare providers.

- Developed strategic revenue growth initiatives that increased the practice's annual revenue by 43.8%
- Recommended switch to subscription-based model for weight loss medicines, reducing churn rate by 44.1%

MAILGUN TECHNOLOGIES, INC. (THOMA BRAVO)

San Antonio, TX

FP&A

2019 – 2021

- Led global Board reporting following the Thoma Bravo acquisition, developing a 60-page monthly package covering KPIs, consolidated performance and integration progress
- Built cross-functional synergy tracking with departmental cost and savings targets; monitored progress against multi-million-dollar pro forma EBITDA improvement goals
- Built a 3-year model covering quota budgets, bookings forecasts and pro forma metrics

PATOKA CAPITAL, LLC

New Albany, IN

Private Equity Associate

2016 – 2018

- Sourced and evaluated 135+ deals; submitted 19 IOIs and 10 LOIs
- Sourced and led the acquisition of a precision timing products manufacturer; underwrote customer-concentration risk and helped shape international expansion strategy. Investment achieved 3.8x MOIC upon exit in 2023
- Sourced and diligenced a precision components manufacturer, built the acquisition financing model and coordinated lenders; diligence supported the decision not to proceed
- Led a sale process without an intermediary for a retail portfolio company; prepared the CIM and secured an international strategic acquirer's IOI 16.7% above comparable transaction benchmarks

EDUCATION

THE UNIVERSITY OF CHICAGO

Chicago, IL

Bachelor of Arts: Double major in Economics and Philosophy, General Honors

2015