JUWON LEE

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SUMMARY

Hands-on Senior Finance Professional with 15+ years of experience specializing in Financial Systems, Regulatory Reporting, and Liquidity Management. Proven track record of automating complex workflows using modern tools (NetSuite, SQL, Python, Tableau) to streamline month-end closes and enhance data integrity. Expert in building granular financial models (13-Week Cash Flow, 3-Statement) for high-compliance environments including Chapter 11 restructuring and B2G contracts. Seeking a Senior Individual Contributor (IC) role to leverage deep modeling expertise and drive operational efficiency.

SKILLS

NetSuite, Anaplan, Oracle ERP, SAP, Hyperion

Advanced Excel (VBA/Macros), SQL (Querying), Python (Pandas for automation), Tableau, Power BI

Basel III, SEC Reporting, Bankruptcy Reporting (MORs), SOX, ASC 606

Liquidity Management, Variance Analysis, Cost Accounting, Revenue Operations, Cash Flow Forecasting

EXPERIENCE

Principal Financial Consultant (Systems & FP&A)

PURPLE MANAGEMENT   **Jun 2023 – Present, Stamford, CT**

- Acting as a fractional FP&A lead for technology clients, designing and implementing automated financial reporting structures.
- Developed Python scripts to scrape and consolidate market data, reducing manual research time by 60% for variance analysis.
- Built dynamic 3-statement financial models and 13-week cash flow forecasts for SaaS and EdTech clients, directly supporting operational scaling.
- Led the migration of financial data to NetSuite, ensuring data integrity and mapping chart of accounts for automated consolidation.
- Structured governance frameworks and reporting protocols for clients entering regulated markets (B2G).

Senior Director, FP&A & Operations

THE PRINCETON REVIEW & TUTOR.COM   **Jan 2019 – Jun 2023, New York, NY**

- Managed full-cycle FP&A processes for a $130M revenue organization, overseeing annual budgeting, monthly forecasting, and variance analysis.
- Spearheaded the transition from manual Excel-based reporting to a dashboard-driven approach using Tableau and SQL, providing real-time visibility into KPIs.
- Identified $7M in cost inefficiencies through granular GL-level analysis and implemented cost control measures that contributed to a $27M EBITDA swing.
- Managed granular daily cash flow forecasting and working capital strategies during the critical COVID-19 period.
- Served as the primary point of contact for external audits, preparing all necessary schedules and ensuring strict adherence to GAAP standards.

Senior Manager, Turnaround & Restructuring (Liquidity Focus)

ALIXPARTNERS (Zolfo Cooper)   **Nov 2017 – Dec 2018, New York, NY**

- Executed critical liquidity management and reporting for a $1.1B Chapter 11 restructuring case (Cenveo).
- Built and maintained complex 13-Week Cash Flow (TWCF) models, providing daily visibility into liquidity for court-mandated reporting.
- Prepared detailed Monthly Operating Reports (MORs) for the U.S.
- Trustee, ensuring 100% compliance with bankruptcy court requirements.
- Conducted deep-dive analysis on AP aging and vendor contracts to optimize working capital without disrupting operations.

Investment Banking Associate (Industrials Group)

JEFFERIES   **Aug 2015 – Jul 2017, New York, NY**

- Executed complex valuation modeling (DCF, LBO, Comps) for M&A transactions valued over $4B.
- Built "best-in-class" integrated financial models that served as the foundation for deal structuring and due diligence.
- Conducted rigorous financial due diligence and credit risk analysis for debt financings.

EDUCATION

MBA

Kellogg School of Management, Northwestern University

BSBA

Ohio State University (Fisher College of Business)