



DANIEL OKONKWO

Fpa

CONTACT INFORMATION

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EDUCATION

- MBA, McCombs School of Business, University of Texas at Austin, 2018
- BBA, Finance, Texas A&M University, 2013

KEY SKILLS

- Annual operating planning
- Board and investor reporting
- Adaptive Planning
- Anaplan
- NetSuite
- M&A integration
- Lender and covenant reporting
- Team leadership (4-6 analysts)
- SaaS and industrial unit economics
- Three-statement and LBO modeling
- Workforce and capacity planning

ABOUT ME

FP&A manager with 11 years scaling planning functions at growth-stage SaaS and PE-backed industrial companies. Lead teams of 3 to 6 analysts, own annual planning, and partner with the CFO and CEO on board materials, lender reporting, and M&A diligence.

PROFESSIONAL EXPERIENCE

FP&A Manager | Northwind Robotics, Austin, TX
2021 – Present

- Lead a team of 4 analysts supporting a \$312M revenue B2B robotics platform across hardware, software, and services lines.
- Run the annual operating plan and quarterly reforecast cycles; standardized templates cut planning calendar from 11 weeks to 7.
- Built the lender package for a 2023 \$85M term loan refinancing, including covenant model and 5-year base/downside scenarios.
- Lead FP&A workstream on two completed acquisitions; integrated post-close reporting in under 60 days each.
- Own the monthly board deck and quarterly investor update; CEO presents directly from the variance commentary.

Senior FP&A Analyst | Slatebridge Logistics, Dallas, TX
2018 – 2021

- Forecasted carrier and fuel spend across a \$480M last-mile network; introduced a lane-level model that improved accuracy by 19%.
- Built the EBITDA bridge used in PE quarterly reporting to Ridgewood Capital.
- Partnered with operations on a routing optimization project that took roughly \$6.2M out of annual variable cost.
- Promoted ahead of cycle after the 2020 leadership transition.
- Coached two analysts who were both promoted within 18 months.

FP&A Analyst | Garrison Industrial Supply, Houston, TX
2015 – 2018

- Supported budget vs. actual analysis for a \$1.1B distribution business with 22 branches.
- Built the first standardized branch P&L pack, used by the COO in monthly operating reviews.
- Modeled pricing changes across three product categories; recommended a tier restructure adopted in 2017.
- Took the lead on quarterly bank reporting for a syndicated credit facility.

Investment Banking Analyst | Coastal Bend Securities, Houston, TX
2013 – 2015

- Two-year analyst program covering middle-market industrials and energy services M&A.
- Built LBO, accretion/dilution, and merger models across 14 live mandates.
- Drafted CIMs and lender presentations for sell-side and refinancing engagements.

- Trained the incoming analyst class on modeling standards.