

DAVID OKONKWO

Financial Analyst

Lead financial analyst and FP&A manager with 13 years in technology and clean energy. Build the corporate forecast model, run the annual plan, and partner with the CFO on board materials and investor reporting. Have led teams of four to seven analysts across two public company finance organizations.

PROFESSIONAL EXPERIENCE

- **Lead Financial Analyst, Corporate FP&A, Solaris Grid Holdings, San Diego, CA**
2021 – Present
 - Run corporate FP&A for a \$1.2B clean energy developer, including the consolidated P&L forecast, cash flow, and project-level returns roll-up.
 - Manage a team of five analysts covering generation, storage, and corporate functions; built the team's first model review and version control standard.
 - Lead the annual plan process across nine business units, finishing the FY24 cycle two weeks ahead of the prior year timeline.
 - Partner with the CFO on quarterly earnings prep, including the operating metrics appendix and the Q&A binder.
 - Rebuilt the project IRR model used for IC approval, surfacing a discount rate inconsistency that changed the ranking on three deals worth around \$215M of committed capital.
- **Senior Financial Analyst, FP&A, Meridian Cloud Networks, Portland, OR**
2018 – 2021
 - Owned the SaaS metrics pack (ARR, NRR, magic number, Rule of 40) used by the board and equity research.
 - Built the bookings-to-revenue waterfall that became the basis for guidance after the company's IPO.
 - Led the FY20 reforecast during COVID, modeling four downside cases in 11 days for the audit committee.
 - Hired and onboarded three analysts as the team scaled from four to seven.
- **Financial Analyst, Coastline Semiconductor, San Jose, CA**
2015 – 2018
 - Supported the gross margin forecast for the foundry segment, including wafer pricing and yield assumptions.
 - Built the headcount and opex plan for a 380-person R&D org across two sites.
 - Took the lead on the monthly close deck for the segment GM after 18 months on the team.
 - Identified a duplicated overhead allocation that corrected segment operating income by about \$3.6M.
- **Investment Banking Analyst, Harborline Securities, New York, NY**
2012 – 2015
 - Two years in the TMT group and one in leveraged finance.
 - Built operating models and LBO models for six closed transactions totaling roughly \$4.8B in enterprise value.

CONTACT INFORMATION

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EDUCATION

- B.S. Finance and Accounting (dual degree), New York University Stern School of Business, 2012
- CFA Charterholder, 2019

KEY SKILLS

- Corporate FP&A leadership and team management
- Annual planning and long-range planning
- Three-statement, LBO, and project finance modeling
- SaaS and recurring revenue metrics
- Anaplan, Workday Adaptive, Hyperion
- SQL, Snowflake, dbt basics
- Board and investor presentation prep
- Hiring, mentoring, and performance management
- Earnings and SEC filing support (10-Q, 10-K)

- Drafted CIM sections and management presentations under associates and VPs.