

SUSAN LEWIS

Managing Director
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[VCARD](#) | [LINKEDIN](#)



Susan has developed a wide range of skills in finance, strategy, strategic communications, and investor relations based on her experience as a finance professional and hedge fund portfolio manager. She focuses on analyzing key metrics and the financial performance of a business to identify opportunities, both strategic and operational, to improve overall performance. Additionally, she is experienced communicating business strategy and initiatives internally and externally to engage key stakeholders like Boards of Directors, employees, investors, and partners. A key to her approach is the ability to develop relationships within a business and become a trusted partner.

Susan has experience across several industries including retail, energy, and core banking software. She started her career as a financial analyst in private equity and corporate banking. In her last role, while managing the investor relations and communications functions, she participated in a strategic M&A transaction and integration, engaged with investors regarding capital structure, and led the strategic communication strategy for an executive transition and strategy shift.

FUNCTION & SPECIALIZATION

- Fractional and interim CFO
- Financial analysis, forecasting and modeling
- Investment analysis (investment case for new business line; investing in publicly-traded equities)
- Financial markets (public and private)
- Strategy
- Strategic, financial and crisis communications

REPRESENTATIVE CLIENTS & PAST EXPERIENCES

- Shift Technologies, Inc.
- CarLotz, Inc.
- Smiley Technologies Inc.
- Carlson Capital

EDUCATION, LICENSES & CERTIFICATIONS

- MBA, The University of Texas at Austin
- BSBA, Washington University, St. Louis