



Brian Monbouquette CPA, Director

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Function and Specialization

Fractional and Interim CFO or Tax Director

Representative CFO Positions (Past & Present)

- Consulting firm specializing in alliance development and management, serving clients across U.S. and Canada
- Online SAAS trading marketplace for middle market and small business
- Home health, physical therapy and adult daycare rollup, employing state of the art telemedicine utilities
- Online SAAS supply chain private networks for cross border trading

Professional Associations

- American Institute and Virginia Society of Certified Public Accountants
- Richmond Venture Forum, VaBio, Richtech, FEI and others

Education, Licenses & Certifications

- BA Economics, Yale University
- MS Accounting, Northeastern University Graduate School of Professional Accounting
- CPA Virginia

Background

Brian works with middle market and emerging growth companies as an interim or fractional CFO, and as a financial consultant applying his extensive experience in tax, capital raising, M&A, and partnering. Brian has 30+ years of experience as a former Big 4 and regional firm tax partner, and as a CFO for a variety of high growth companies, predominantly with firms in healthcare/life sciences, software/Internet services, clean energy, manufacturing and other services.

Professional and Industry Experience

Brian started his career in the Boston and Providence offices of Price Waterhouse, where he worked for 23 years with both large multinationals and emerging growth companies, as well as with venture capital funds, healthcare providers, and the country's largest independent hydro site consolidator, among others.

Since leaving PW, Brian has been active in both private operating management and public accounting roles. He has been a partner with leading regional public accounting firms in New England and the Southeast, providing business and tax advice to middle market and emerging growth clients. He advised clients involved in software, internet services, health IT, life sciences, medical devices, venture capital and private equity, manufacturing and various services, on subjects including M&A, international expansion, multistate taxation, family ownership transition, executive compensation, and various tax minimization opportunities. Brian has also been fulltime or fractional CFO for several early stage, high growth businesses. He helped raise over \$17M and grow a startup online trading marketplace to over 130 personnel, prior to eventual sale of that company. He was COO and CFO of a consulting firm that grew to more than 40 fulltime and "on call" consulting resources providing services primarily to the Fortune 500. He also was founding Treasurer of a professional group organized to share best practices in the burgeoning area of alliance development and management. Recently, he led VC fundraising and business plan development as fractional CFO

of a SAAS software startup, and in a similar role for a healthcare group raising private equity funds to make regional acquisitions and establish a new geographic hub. He also worked for over seven years as the fractional tax director of a fast-growing, PEG-owned manufacturer, providing tax-savings and problem resolution advice while coordinating the outsourcing of tax preparation and other specialized advisory needs.

Specialized Tax Projects

- Adviser to >\$1.5B of M&A and financings
- Evaluation of software provider's state tax nexus in all states
- Tax planning saved or deferred more than \$800K of taxes in the year prior to company sale, and since inception accumulated another \$2.5M of accelerated deductions and credit carry-forwards.
- Applications for accounting method changes involving advanced payments, accounting errors, self-insurance reserves, R&D cost capitalization, LIFO, and others.
- Supervision of Federal and state tax filings for family-owned company operating in 27 states, and a PEG-controlled group filing in 40+ states.
- Led 12 R&D Credit studies involving software development, carbon composite manufactured products, custom-designed electrical components, custom lighting, molded plastic products, and related manufacturing processes.
- Led firm team which conducted multiple Cost Segregation studies of both new and acquired facilities.
- Implemented IC-DISC for Internet exporter, and led study of impact of increased sourcing from China on overall costs and Federal tax benefits.
- Led analysis of retaining tax haven status for software development group in India and impact of "checking the box" for U.S. tax purposes.

Brian maintains an active network of technical tax experts developed over his career, along with successful entrepreneurs and fundraising contacts involved in biotech, healthcare, internet services and renewable energy.