

LISA DELFINI, CPA*
PARTNER ► ADVISORY SERVICES



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Lisa Delfini is a partner in the Firm's Advisory Services practice and is the leader of the Firm's Interim Management services group and is a frequent presenter on these topics. She has over 28 years of experience in both public accounting and private industry, including 17 years auditing companies of all sizes. Her experience includes companies in the pharma, high-tech, consumer products, manufacturing, real estate, investment management and grocery distribution industries.

Prior to joining Marcum, Lisa was a global controller for four years at a Fortune 50 multinational corporation. In her first role there, she served as a technical advisor to the principal accounting officer, consulting with the industrial business controllers on complex and subjective accounting matters. In addition, she set accounting policies and procedures, prepared and reviewed SEC financial statements and disclosures, and conducted training courses. In her second role there, she was the controller of a division with \$4B in annual revenues and over 120 locations around the globe. During this time, Ms. Delfini was responsible for all aspects of financial reporting, supervising a team of 30, and provided strategic leadership to industrial an ERP implementation at all North American and European locations.

Previously, Ms. Delfini was a partner at a global accounting firm, working in several different roles, including leading audit engagements, serving as an engagement quality reviewer, publishing accounting publications and consulting on technical accounting matters in the firm's national Department of Professional Practice. In addition, Ms. Delfini was a partner in the SEC Services Group, reviewing SEC filings for annual and quarterly reports, and public offerings of debt and equity, and helping clients have productive and efficient correspondence with the SEC. She took an international assignment in 1994.

Ms. Delfini also was a manager of finance at a manufacturing company in New Haven, CT.

Professional & Civic Affiliations

American Institute of Certified Public Accountants (AICPA)
Juniper Point Property Owner's Association, Treasurer

Articles & Presentations

Your Company's Life Cycle: Crucial Legal and Accounting Matters, 2019 Marcum Life Science and Biotech Summit, New Haven, CT, September 2019
A Construction Company's Guide to the New Revenue Recognition Standard, Construction Executive, April 2019
Trends in SEC Comment Letters on Life Science and Biotech Companies, 2018 Marcum Life Science and Biotech Summit, New Haven, CT, November 2018
Meet Marcum's CFO and Controllershship Advisory Services Group, Valuation and Litigation Support Advisor, August 2018
The Accelerator for Biosciences in CT: Packaging Your Company for Investment, Marcum SEC Insights: Are You Ready for an IPO?, January 2017
Understanding Reg A+ and the 'Mini-IPO', September 2016

** Licensed by the State of Connecticut*

EXPERTISE

- Revenue Recognition
- Impairment Analysis
- Research & Development Costs
- FASB & SEC Rules & Regulations
- SEC Comment Letters
- Due Diligence
- Functional Currency Determinations
- Fund of Funds Accounting
- Finance Transformation
- Initial Public Offerings
- Issuances of Debt & Equity
- Acquisitions & Dispositions

INDUSTRY FOCUS

- Manufacturing
- Consumer Products
- Life Sciences
- High Technology

EDUCATION

- Bachelor of Science in Accounting, Lehigh University

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