



TRADITIONAL CONSULTING • INNOVATIVE RECRUITMENT

JOSEPH MARKUNAS, CPA
Consulting CFO

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EXECUTIVE SUMMARY

Consulting CFO who works with a diverse group of technology, manufacturing, life science and other clients, their founders, and investors to distill and tell their story through business eyes, bridging the gap between technology and finance. He translates the innovative technology into functioning business models so that investors can grasp how the offering can be commercialized and operationalized for an ample return on their investment.

Joe’s mining and natural resource recovery experience includes a California based mining client where he developed the financial model for a \$350 million top line opportunity requiring investor funding of \$10 million.

In Tanzania Joe and his medical device startup, NoDK, worked with Verlyn Harris, founder of Hearts and Hands for Humanity, a Utah based NPO dedicated to drilling wells in that country for the purpose of providing essential clean water and the resulting economic activity that flows from same.

Joe and his company have also worked in Ghana and in various South American nations with their ministries of public health to introduce innovative, disruptive technologies to those regions.

Joe has participated in successful M&A transactions totaling more than \$500 million in aggregate value with both public and private clients. In so doing he provided essential planning, audit readiness and due diligence support for these transactions.

EXPERIENCE

PARTNER, CONSULTING CFO

2015 to Present

Specialty consulting CFO and recruiting firm that customizes financial management solutions by utilizing part- and full-time staff through contract employment or direct hire.

- Leads the Healthcare and Life Science practice group and co-leads the Cleantech & Small Business practice groups.

CFOs2GO

www.cfos2go.com

CHIEF EXECUTIVE OFFICER

2011 to 2015

- Developed business and financial model (OHO) for innovative mobile dental hygiene service for seniors in independent, assisted living and memory care communities from conceptual abstract to commercialization.
- Formed sister company (NoDK) to patent and file for FDA approval for medical device(s) to treat dental disease. Manage research and development pipeline to further the commercialization of innovative methods and devices.

Oral Health Outreach, LLC/NoDK, LLC.

Lake Oswego, OR

CHIEF EXECUTIVE OFFICER

2009 to Present

- Consultant of developing a diversified, integrated web of agricultural enterprises in North, Central and South America for agriculture import/export client. Built financial model for an organic and conventional pineapple growing opportunity in Costa Rica which led to successful formation of joint venture and funding for same. Annual sales \$30+ million, 20 – 40 employees.

Magnolia Consulting, LLC.

Lake Oswego, OR



PROFESSIONAL ACTIVITIES

- American Institute of CPAs
- Oregon Society of CPAs
- California Life Sciences Institute
- Oregon Entrepreneurs Network
- Oregon Opportunity Network
- Advisor for Fellows All Start Team - California Life Sciences Association
- Board of Directors - Monument Impact.
- Member American Arbitrator Association.

AUTHOR AND SPEAKER

- Author of “Tax Guide for the Intimidated”. Hawthorne, N.J: Career Press. National distribution in 1994 and 1995.
- Guest speaker, Utah and Oregon CPA Associations and American Institute of CPA’s.

EDUCATION

- CPA
 - BA, UP
- Concentrations: Accounting

For more information:
<https://www.2goadvisorygroup.com/meet-partners/joe-markunas-bio>