

Jason Stern, CPA

Chicago, IL

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SUMMARY

CPA with over seven years in public accounting and a proven track record in financial due diligence and analysis. I bring extensive experience in navigating complex transactions and financial issues. As a Manager at Deloitte & Touche and a Vice President at Kroll, I led due diligence efforts for M&A deals across diverse industries, including energy, resources, industrials, and professional services. My expertise in financial analysis, project management, and cross-functional collaboration positions me well to lead strategic initiatives and drive growth, leveraging my skills to shape winning strategies and deliver impactful results.

EXPERIENCE

Kroll Chicago, IL
Vice President, Transaction Advisory Services July 2024 – Present

- Oversaw financial due diligence on sales and acquisitions of middle market companies between \$25 – \$75m purchase price, with a focus on software and professional services
- Compiled and wrote training materials for incoming team members as part of monthly Vice Presidents' Committee initiative

Deloitte & Touche, LLP Chicago, IL
Manager, M&A Transaction Services May 2022 – November 2023

- Led financial due diligence from inception to close on sales and acquisitions between \$35m – \$750m purchase price, with a focus on energy, resources and industrials, and additional exposure to consumer and healthcare
- Assisted with planning and resource allocation for the Transaction Acceleration Group, a newly-implemented firm initiative created to provide turnkey due diligence solutions for less complex targets
- Helped to create and lead bi-weekly virtual office hour sessions with junior staff to provide the opportunity for them to refresh their skills and ask questions in an informal setting

Senior Consultant, M&A Transaction Services January 2021 – May 2022

- Provided financial due diligence to both strategic and private equity clients in buy-side and sell-side transactions
- Assisted in the preparation of due diligence reports, including documenting company background and key accounting policies, as well as identifying abnormal fluctuations or unusual balances in order to determine key drivers of historical EBITDA and working capital

Ernst & Young, LLP Chicago, IL
Senior, Assurance October 2019 – January 2021

- Served as in-charge on audits of benefit plans as well as a Fortune 500 manufacturing company, ensuring timely and on-budget completion
- Strong knowledge of US GAAP and PCAOB guidelines as well as SEC Reporting standards
- Instructed, directed, and reviewed the work of staff in the completion of audit procedures over client accounts, such as cash, A/R, inventories, property, plant and equipment, prepaids, A/P, accrued expenses, and debt

Staff/Assistant, Assurance September 2017 – October 2019

- Provided assurance over quarterly and annual financial reporting for a variety of technology and manufacturing clients (both public and private) in accordance with US GAAP, SEC, and AICPA standards
- Performed substantive procedures over revenue recognition, purchase-to-pay, and order-to-cash business cycles
- Served as main contact between local team and EY India team in coordinating and delegating tasks

Morningstar, Inc. Chicago, IL
Client Service Consultant, Morningstar Financial Software April 2015 – July 2017

- Responsible for providing consulting services to financial advisor customers in Midwest, East Coast, and Eastern Canada, resulting in 20% increase in year-over-year customer retention, leading to improved product profitability
- Project managed cross-functional, global team efforts to execute ESG (Environment, Social, Governance) product launch
- Managed transition of customers from retired product line to a cloud-based product, achieving over 90% customer retention
- Consistently recognized as a top performer for outstanding client service through client surveys and feedback

EDUCATION

DEPAUL UNIVERSITY, KELLSTADT GRADUATE SCHOOL OF BUSINESS Chicago, IL
Master of Science in Accountancy June 2017

- Member of Beta Alpha Psi, Business Honors Society

Washington University in St. Louis St. Louis, MO
Bachelor of Science in Business Administration May 2010

- Participated in study abroad program at Fudan University in Shanghai, China during summer of 2010

ADDITIONAL

- CPA licensed in Illinois, ID #065.052320
- Advanced in Microsoft Excel