

## Joseph A. Gitto Jr., Certified Senior Advisor

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### Objective

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Experienced, results oriented executive with experience in Finance, Sales, Marketing and Operations seeking opportunity to utilize cumulative experiences and join a management team focused on building a winning organization. Experiences and achievements include:

**Business Development** – With MPI and LAP responsible for developing and growing Florida, and Alabama markets through development of network of professional referral sources (Attorney's, CPA; s and PE firms). At Geller & Co individually responsible for generating in excess of 50% of business unit revenues. Skilled at developing strong pipeline and opportunity conversion.

**Marketing-** Responsible for redesigning and refreshing MPI collateral materials and web-site. Developed series of monthly direct mail pieces to position MPI as industry thought leader to its client base. With LAP redesigned all marketing and collateral materials as well as Tradeshow / Conference Booth and materials. Worked with outsource SEO provider to drive 50% of Brightstar revenue from web referrals. Developed strategies, plans and programs to launch and grow the Geller & Company's Venture Backed Practice, SEC Practice and Emerging Business Group's New Jersey office.

**Leadership** – Built industry leading private duty home health business with Brightstar Home Health Care. Turned around, right sized and stabilized Life Audit Professionals. Hired and developed a strong management team to manage multiple diverse engagements as well as to drive significant growth of the Geller Emerging Business unit. Worked with client CEO's in developing management teams and implementing and running regular management meetings. Aligning individual goals with organizational goals and objectives.

**Business Planning** – Developed and executed business plans for launch and continued growth of Brightstar business. Developed and executed turnaround and growth plan for LAP. Developed strategic, operational and financial plans for Geller Emerging Business Group as well as for various clients as part of role as outsourced CFO. Developed business plans used to raise capital as well as for clients to actively manage, grow and diversify their businesses.

**Capital Raising** – From 2002 – 2007 involved in over \$100 million in venture capital financings working with multiple clients and over a dozen venture capital firms, as well securing working capital lines and client recapitalizations. At Skilltech Global experience with IPO of wholly subsidiary, Private Placements, Bond Offering, and debt restructuring.

## **Professional Experience**

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### ***BrightStar Home Health Care***

***January 2012 – March 31, 2019***

***Co-owner, President, CFO, Director of Sales***

Leading national franchise that provides in home skilled and non-skilled care to seniors' and pediatrics. Our agency recognized by industry 3<sup>rd</sup> party surveyor as Employer of Choice, Provider of Choice and Leadership Excellence 3 consecutive years – 2016 - 2018. Business grew from start up to a bench of 95 Certified Nursing Assistants, 12 Licensed Practical Nurses and 8 Registered Nurses serving Osceola and Brevard counties.

Responsibilities include managing sales staff, working with third party marketing organizations, oversee finance function. Focused on enterprise sales and strategic relationships for firm.

### ***Life Audit Professionals, LLC (“LAP”)***

***March 2015 – July 2017***

***Principal (25% ownership) CFO, Sales and Marketing***

Responsibilities include reorganizing back office operations, implementing process and procedures. Clean up financial record keeping. Revised all marketing and collateral materials. Created Thought Leader Series as Educational tool targeted towards our professional referral sources. Reengage with Southeast referral sources to drive new business. 2016 revenue from premiums increased from \$465,000 to \$1,466,000, turned \$500,000 loss into \$210,000 profit.

### ***Management Planning Inc. (“MPI”)***

***September 2007 – March 2015***

***Senior Vice President Business Development***

Joined Management Planning, Inc. (“MPI”) in September 2007 upon relocating to Florida.

Responsibilities include developing and maintaining relationships with attorney's, CPA's, trust officers and business owners. Since joining MPI have been involved in numerous valuations for estate planning purposes, financial reporting requirements and sale of businesses. Initially involved in developing and building out the firm's Financial Reporting practice. Also co-led the team that launched our Atlanta office in January 2010. Involved in the Company's advisory business using my diverse skills garnered over my career to work with clients pursuing potential transactions. In December 2010, also took on responsibility of managing the firms marketing function. In April 2011 launched new brochures, collateral materials and launched new web site.

### ***Geller & Company***

***March 2002 – June 2007***

Joined Geller & Company in March 2002 as part of sale of my business (MCG & Associates) to Geller & Company to launch Emerging Business Group. Promoted to lead executive to launch Geller's New Jersey Operation in May 2004, promoted to Managing Director Emerging Business Group June 2006.

**Managing Director  
June 2006 to June 2007**

Upon taking over as Managing director, I used the first 100 days to create a platform with which to build a fast growing and profitable business unit. Grew revenues by 80% and headcount from 35 to 68 during 12 month period. During the first 100 days reorganized the management team into an Executive Committee and Operating Committee. Immediately addressed the under performers and moved them out and replaced them with high caliber talent. Recruited the groups first dedicated Head of Business Development and created a new position SEC Quality Review. Instituted an in house training program that was provided on a monthly basis and was mandatory for all new hires. Instituted a “peer review” program where each month a random selection of clients were tested against our stated processes and procedures to ensure quality control of client engagements. Reviewed our portfolio of products and services closing an unprofitable non complimentary service offering and introducing a new product offering and a new services offering.

**General Manager New Jersey Office  
May 2004 to May 2006**

- Secured site, hired staff, integrated New York and New Jersey operations into one cohesive operating unit.
- Lead business development in terms of opportunities and closed business in the firm.
- Achieved first year revenue goal for new office in seven months profitably.
- Strong team building and culture building skills to develop cohesive management team.
- Work with client management on developing financing, expansion and exit strategy plans.
- Developed and executed marketing plan to create awareness in New Jersey
- Created Sarbox lite for venture backed companies to preserve exit strategy.
- Worked with publicly traded SPAC’s
- Worked on multiple reverse manager transactions
- Maintained core client base and served as their outsourced CFO
- Member steering committee NY/NJ Venture Capital Counsel.
- Speaker at numerous Venture Forum events.
- Recruiting and development of staff. Grew New Jersey office from 4 to 20 in 13 months.
- Active participant on 6 client company Board of Directors.

**Senior Manager  
March 2002 to May 2004**

- Founding member of Emerging Business Group (“EBG”)
- Served as interim CFO to various metropolitan area companies both publicly and privately held.
  - Financial Reporting
  - Budgeting / Forecasting
  - Treasury Management
  - Corporate Governance
  - Supply Chain Development
  - Board Presentations
  - Risk Management
  - Internal Controls
- Spearheaded EBG effort into developing venture backed initiative.
- Developed infrastructure processes and tools to support expanding business unit.

▪ **Industry Experiences**

- Software Development
- Internet Security
- Biotech
- Internet Advertising
- IT Consulting
- Defense industry
- Healthcare Consulting
- Independent Research
- Publishing
- Meat processor
- Food producer
- Financial Services
- Speech recognition
- Telcom

***MCG and Associates***

***September 1999 – March 2002***

Founder, sold practice to Geller & Co in March 2002.

Founded MCG and Associates, a pioneer in providing outsourced CFO solutions to emerging organizations. As sole owner, built business to 7 employees and \$1 million in revenue in three years. Projects included business plan development, preparation of presentations for raising venture capital, recruiting and building management teams. The firm offered CFO and controllership services to emerging businesses for transaction processing and monthly financial reporting to numerous businesses in the metropolitan area. The firm was featured in articles in Crain's NY and The Journal of Accountancy. Prior to sale of firm, was working on a joint venture to provide emerging organizations with a one stop shop for financial service, human resources and IT.

***Skilltech Global Graphics (NASDAQ): IMTKA***  
**1996 – 1999 President and CFO**

***April 1992 to September 1999***

- Integrate Acquisitions – Operations, management teams, workflow and process.
- Led strategic shift from traditional Offset print shop to Digital print shop.
- Negotiated union and non-union agreements.
- Guided company through SEC investigation and successfully won NASDAQ delisting hearing.
- Raised financing through Reg S, convertible bond offerings and preferred stock issuances.

**1994 – 1996 CFO**

- Oversaw Staff of 14
- SEC Reporting
- Annual Audit
- Vendor negotiations – convert \$1.5 million of trade payable into unsecured notes.
- Automated overall accounting function.
- Negotiated Bank Lines
- Conversion of 12% secured bonds into preferred stock.

**1992 – 1994 – Controller**

- Monthly closings
- Consolidation
- Preparation of financials and supporting schedules for SEC filings.
- Worked on IPO of wholly owned subsidiary INSCI Corp [Nasdaq:INSI]

***Other Professional Experience***

Envirospan Safety  
Seltel, Inc.  
Dreyfus  
Shearson Lehman  
Associate Factors

## Education

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- Baruch College, BS Accounting and Finance
- Currently completing CFP Certification at the University of Florida
- Passed all four parts of the CPA exam in New York
- Certified Trainer BrightStar Connections Alzheimer's & Dementia Caregiver Program
- Enrolled University of Florida – Certified Financial Planning Certification
- Licensed Insurance Professional W348105

## Lectures & Publications

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- ◆ Speaker Vitas Caregiver College – Training family caregivers for caring for a loved one with Dementia, April 2017
- ◆ Speaker Celebration Foundation, Veterans Benefits and Long-Term Care Insurance, -semi-annually 2015, 2016, 2017, 2018
- ◆ Speaker Celebration Foundation, Fall Prevention, October 2011 - 2016
- ◆ Speaker / Presenter Business Law Section of the Georgia Bar Annual Meeting – “Valuation Audit Issues” October 2010.
- ◆ Speaker / Presenter Business Law section of the Florida Bar Annual Retreat – “Deal or No Deal” September 2010.
- ◆ Speaker / Presenter Business Law section of the Florida Bar Annual Retreat – “Goodwill impairment and practical considerations” (3 CLE credits) September 2009.
- ◆ Speaker/Presenter- Business Law section of the Florida Bar – Learn at Lunch CLE – Financial Reporting Valuation Issues and Current Trends – January 2009
- ◆ Lecturer Seton Hall's Entrepreneurial Studies Program September 2006.
- ◆ Volunteer CFO – Project Sunshine 2006. ([www.projectsunshine.org](http://www.projectsunshine.org))
- ◆ Moderator - Innovation to Exit – Capital for High Growth Companies.
- ◆ Moderator – Gateway to Silicon Valley – How do east coast companies attract west coast capital – October 2005.
- ◆ Moderator – NJ Venture Scene – Venture Capital for early stage and emerging business – July 2005.
- ◆ Moderator - NY Venture Fair at MSG – The do's and don'ts of attracting Venture Capital – June 2005.
- ◆ Moderator – Venture Scene NY – Funding Software & IT Start-ups.
- ◆ Speaker/Presenter – Best Practices on Finance – Co-hosted with Administaff.
- ◆ Speaker/Presenter – How to prepare your company for financing – Co-hosted with Comerica Bank, Jerusalem Venture Partners and Gibbons, Del Deo, Dolan & Griffinger.
- ◆ Panelist – NJ Venture Scene – Valuations and Exit Strategies.
- ◆ Moderator – NY Venture Summit – Fundable Deals – What do VC's look for?
- ◆ Speaker – New York City Economic Development Corp. “Financing Strategies in a Down Economy”.
- ◆ Speaker – State Society of CPA's Conference for High School Teachers with business programs – “Careers in Accounting”
- ◆ Panelist – New York Business Forums – Benefits of Outsourcing.

- ◆ Host – Business Development Workshop on Capital Financing – panelists included Starvest Partners, Fleet Bank and Ballon Stoll & Nader.
- ◆ Author – Entrepreneurs Guide to Raising Venture Capital – NJTC TECH NEWS – April 2006 edition.
- ◆ Author - Pros and cons of reverse mergers. When is it the right decision? – NJ Tech News – April 2007 Edition.
- ◆ Author – So now that you have completed your financing ... - NJ Tech News – November 2006 Edition
- ◆ Featured in Crain’s New York September 2000 issue, “CFO Outsourcing in turbulent Silicon Alley”.
- ◆ Featured in CPA Journal May 2001 issue, “CFO Alternative”.

### **Affiliations and Other**

- ◆ Co-Founder South Florida Business Succession Master Mind Group 2/16 – Present
- ◆ Osceola County Community Coalition Steering Committee
- ◆ Former member of Steering Committee NY & NJ Venture Scene

### **Community Service**

Treasurer Windermere Preparatory School Volunteer Association – 2009-2010

Soccer Coach Winter Garden Soccer League 2009 – 20017

Founder F.C Firestorm Soccer League, Winter Garden Fall 2017