

Stephen Hansen

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SUMMARY

FP&A leader for private equity roll-ups, focused on replacing manual work with systems that scale. Leads planning and reporting at a PE-backed, multi-brand platform and builds custom software around the company's own workflows. Previously led capital allocation for a \$1.7B supply chain transformation at Lowe's (Fortune 50), after an investment banking career spanning \$2B+ in M&A and capital markets transactions.

PROFESSIONAL EXPERIENCE

Vertex Service Partners · Backed by Alpine Investors

Charlotte, NC

Senior Manager (Financial Planning & Analysis)

Mar 2025 – Present

- Promoted to Senior Manager for high performance; lead financial planning and analysis for a multi-brand, acquisitive home services platform and drive the adoption of technology and automation across the finance organization.
- Stood up the company's business intelligence platform (Sigma) from the ground up, delivering real-time, self-service analytics that give the business immediate visibility into performance across every partner company.
- Built an automated financial reporting package that replaced a slow, manual analysis process with instant, AI-generated commentary, giving branch managers and regional leaders an immediate read on their business rather than waiting on FP&A.
- Designed and launched a custom web application platform from scratch using AI: tools built around Vertex's own workflows to help the business run more efficiently, now used daily by the sales, operations, marketing, acquisitions, HR and executive teams.
- Named company MVP alongside our data engineer for the value these tools delivered, and helped lead FP&A to be ranked the number one finance team across Alpine Investors' portfolio companies.
- Drove FP&A to the highest internal satisfaction (NPS) score of any department in the organization, powered by the AI-enabled tools and applications the team built and deployed to employees company-wide.

Lowe's Companies, Inc. · NYSE: LOW

Mooresville, NC

Finance Manager (Financial Planning & Analysis)

Jun 2020 – Mar 2025

- Direct promote to Finance Manager for high performance and leadership; led financial planning, budgeting, and capital allocation for Lowe's \$1.7B supply chain transformation, optimizing one of the largest supply chain networks in the U.S.
- Owned P&L expense management, forecasting, and reporting, developing financial modeling processes to enhance monthly and annual planning cycles across supply chain operations and real estate assets.
- Partnered with senior leadership to drive investment prioritization, aligning capital allocation with enterprise-wide strategic initiatives to maximize ROI and shareholder value.
- Developed business cases securing \$840M+ in total funding from the Investment Committee; took over project execution in 2023 and deployed \$236M of capital in first year leading the team, \$100M+ above the historical average.
- Oversaw a portfolio of ~200 capital projects annually, providing financial oversight for cross-functional teams and advising 10+ project managers on cost controls and risk mitigation.

Jefferies LLC · NYSE: JEF

Charlotte, NC

Senior Investment Banking Analyst (Technology, Media & Telecommunications)

Apr 2018 – Jun 2020

- Managed sell-side, buy-side, and debt capital markets transactions for M&A processes through the development of marketing materials and financial models; supervised management meetings, buyer discussions, and due diligence.
- Interfaced regularly with clients and prospective buyers to ensure bilateral transparency on deal timeline, ongoing financial performance, and pricing / deal structure preferences.

NOTABLE TRANSACTION EXPERIENCE

mthree, Inc.	\$175M sale to John Wiley & Sons (sole financial advisor, closed)
Revature LLC	Sale to Investcorp (sole financial advisor, closed)
Ellie Mae, Inc.	\$1.4B senior secured credit facilities (left lead arranger, closed)

FMI Capital Advisors

Raleigh, NC

Investment Banking Analyst (Engineering & Construction)

Apr 2017 – Apr 2018

- Covered the architecture, engineering, and construction sector as the sole construction-materials analyst, running sell-side M&A across ready-mix, aggregates, asphalt, and precast businesses.
- Built backlog and work-in-process margin analyses to surface EBITDA-growth opportunities by project type, size, and market, sharpening how each business was positioned to buyers.
- Screened 50+ potential acquirers against EBITDA and geographic criteria to shape targeted buyer lists, adding private-equity bidders that advanced to diligence.

NOTABLE TRANSACTION EXPERIENCE (CLOSED, FROM 10+ ENGAGEMENTS)

Palmer Paving	Sale to Peckham Industries
Midwest Minerals	Sale to Summit Materials
McCartney Construction	Sale to Vulcan Materials
Shockey Precast	Sale to Metromont

Ernst & Young LLP

Charlotte, NC

Employment Tax Analyst

Jul 2016 – Apr 2017

- Engineered complex tax models for Fortune 500 companies covering non-qualified deferred compensation, state unemployment insurance account consolidation, and M&A look-back reviews.
- Sourced new engagements by mining S&P Capital IQ and 10-K data; the models built for clients drove \$250K+ in additional work won.

ADDITIONAL EXPERIENCE

National Football League · Game Statistics & Information System

Apr 2024 – Present

Part-time, game-day role on the NFL's official statistics crew, worked alongside my full-time finance career.

EDUCATION

University of North Carolina at Chapel Hill

Chapel Hill, NC

Bachelor of Science in Business Administration

Class of 2016

GPA: 3.5/4.0 (Graduated with Distinction)

SKILLS

Finance & FP&A	Financial planning & analysis, financial modeling, budgeting & forecasting, capital allocation, M&A, P&L management
Data & BI	Sigma, Snowflake, SQL-driven analytics, Power BI, data visualization
AI & Web	AI-powered tools & apps, LLM-assisted workflows, workflow automation, Next.js / web development
Tools	Excel, PowerPoint, Capital IQ, PitchBook