

Dave Bettner

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Enterprise SaaS and financial-reporting professional with 12+ years leading implementation, integration, and customer delivery work. Builds practical AI-enabled workflow tools—including API integrations, agent orchestration, and verification controls—for high-accuracy reporting environments.

EXPERIENCE

Senior Manager

LSL, LLP · Oct 2025 – Present

- Own delivery on governmental ACFR: reporting architecture (TB → statements → footnotes), adoption, training, and production cutover.
- Agent-assisted workbook sweeps with journaled changesets and automated tie-outs before sign-off.

Manager - Digital Services

Citrin Cooperman · Dec 2024 – Oct 2025

- Managed five-person Workiva implementation team at a Top 100 CPA firm.
- Delivered financial and regulatory reporting implementations across close, review, and controls workflows.

Solutions Architect

Workiva · Sep 2022 – Sep 2024

- Scoped ERP/GL → Workiva integrations; resolved API blockers for SEC, IFRS, XBRL, SOX, and audit reporting.
- Built integration checklists and training handoffs; fed recurring account patterns to Product.

Professional Services Consultant

Ambra Health · Aug 2021 – Sep 2022

- Healthcare imaging startup; continued through acquisition by Intelrad Medical Systems.
- Regulated SaaS implementation: discovery, configuration, integration troubleshooting through go-live.

Professional Services Manager

Workiva · May 2017 – Jul 2021

- Led implementations to production: GAAP/IFRS/XBRL configuration, end-user training, expansion demos with Sales.

Financial Reporting Manager

Workiva · Sep 2015 – May 2017

- SEC reporting, XBRL, and quarterly statement preparation.

Data Research Analyst Intern

Kingland Systems · Mar 2014 – Sep 2015

- Financial data research and quality assurance on corporate and securities datasets.

SELECTED TECHNICAL PROJECTS

- **Workiva MCP Server** — Built and maintain an authenticated API integration that lets AI workflows read and update Workiva spreadsheets and documents instead of manual browser work. Implemented document linking, data refreshes, exports, asynchronous job polling, and production error handling; used daily on live government financial reports (35+ sheets).
- **Agent-Assisted Financial Reporting Workflow** — Designed a workflow for regulated reporting in which separate AI agents inspect data, propose changes, apply approved updates, and independently verify results. Uses scoped credentials and readback checks so automated work is traceable and reversible.
- **Wingman Spreadsheet Quality Tool** (github.com/dbett4/wingman) — Chrome extension and companion service that detects common spreadsheet defects, presents a proposed fix for approval, applies the correction, and confirms the result. Logged outcomes improve detection quality over time.

EDUCATION

M.Acc. · B.A., Accounting — Iowa State University

TECHNICAL SKILLS & CERTIFICATIONS

Workiva Certified Delivery Engineer · Configuration Specialist · Data Management Suite · MCP · Python · REST/OAuth APIs · ERP/GL integrations · agent orchestration · credential scoping · SOX/GRC · governmental ACFR