

Date completed/ revised: DD/MM/YYYY

Position Details

Title	CFO – Chief Financial Officer
Reports To	Insert title, not individual's name
Department	Executive
Position Status	<input type="checkbox"/> Employee <input type="checkbox"/> Contractor <input type="checkbox"/> Consultant <input type="checkbox"/> Full-Time <input type="checkbox"/> Part-Time <input type="checkbox"/> On-going <input type="checkbox"/> Term Term End Date (if applicable): DD/MM/YYYY
Eligible for Benefits	<input type="checkbox"/> Yes <input type="checkbox"/> No Comments if applicable
Overtime Exemption Status	<input type="checkbox"/> Exempt <input type="checkbox"/> Non-Exempt
Variable Compensation	<input type="checkbox"/> Bonus <input type="checkbox"/> Commission <input type="checkbox"/> Shift Premium <input type="checkbox"/> Car Allowance <input type="checkbox"/> Not applicable
Hours per Week	Insert actual expected hours of work per week, excluding breaks or lunch/week
Location	
Job Classification	CUSTOMIZER: If classifications have been established, insert job categories. Below shows an example. Otherwise, delete this row <input type="checkbox"/> Clerical <input type="checkbox"/> Administrator <input type="checkbox"/> Coordinator <input type="checkbox"/> Manager <input type="checkbox"/> Director <input type="checkbox"/> VP
Salary Range	Insert salary range, or insert: "As per Job Classification"
Direct Reports	As of DD/MM/YYYY but subject to change, position is responsible for Insert number direct reports, as follows: ♦ Title. Insert additional bullets as required <input type="checkbox"/> Not Applicable

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The CFO also understands that they and their team are service providers to various stakeholders and executes their role with a customer service approach.

Responsibilities/Accountabilities

Responsibilities:

1. **Ultimate responsibility and accountability for transactional accounting and financial best practices in the following areas:**
 - a. Accounts Receivable
 - b. Accounts Payable
 - c. Payroll & benefits administration
 - d. Cash management
 - e. Compliance
 - f. Tax planning
 - g. Month end and year end accounting
 - h. Financial reporting
 - i. Financial controls
 - j. Development and implementation of accounting policies
 - k. Application of GAAP and accounting principles practices
 - l. Budgeting
 - m. Information management
 - n. Contracts
2. **Strategic Example 20%**
 - a. Raises capital.
 - b. Drives mergers and acquisitions.
 - c. Drives the Company's financial strategy.
 - d. Implements technology solutions to increase productivity and efficiency in the department.
 - e. Performs risk management through analysis of Company investments and liabilities.
 - f. Evaluates and manages capital structure.
3. **Staff Management Example 20%**
 - a. Hires, motivates, develops, and manages performance of a diverse workforce, in line with Company values and goals.
 - b. Ensures high performers are retained.

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Experience/Education/Training

Experience/Education/Training	Required	Preferred
A minimum of 10 years' experience in a strategic financial position	x	
Strategy or initiative implementation that resulted in an improved financial position for the Company during their engagement	x	
Raising capital beyond traditional lines of credit	x	
Mergers and acquisitions		x
Investor relations		x
Advanced accounting degree	x	
Insert experience, diploma, certification, training, or designation		

Position Success Traits

FINANCIAL MANAGEMENT

- ◆ Understands the Company is in business to make a profit.
- ◆ Uses quantitative information to monitor operations and make strategically-based decisions.
- ◆ Establishes and adheres to realistic budgets and analyzes variances for immediate action.
- ◆ Demonstrates fiscal responsibility and gets the best value and return on investment for the Company.
- ◆ Spends funds on initiatives that are the most strategically aligned with, and provide the strongest business case for the Company.
- ◆ Adheres to headcount and workforce ceilings.
- ◆ Makes and supports decisions in line with the Company's financial health, including adjusting resource levels.

STRATEGIC FOCUS

- ◆ Generates and applies alternative and viable strategies or business models to create competitive advantages for the Company.
- ◆ Finds ways to capitalize on opportunities and provide customer value.
- ◆ Thinks holistically and futuristically.
- ◆ Constantly scans internal and external environments.

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- ◆ Analyzes, explains, and draws logical conclusions based on complex data from multiple sources.
- ◆ Quickly perceives implications and makes sound decisions.
- ◆ Demonstrates strong critical thinking skills.
- ◆ Cuts through non-essential, illogical, over-generalized, or unsubstantiated information.

INNOVATION / CREATIVITY

- ◆ Thinks outside the box.
- ◆ Challenges status quo and traditional 'the way things have always been done' thinking.
- ◆ Applies original thinking in approach to the position.
- ◆ Engages in responsible dialogue and brainstorming to develop new ideas and unique solutions to problems.
- ◆ Continuously seeks ways to improve all aspects of the Company and communicates suggestions.

CUSTOMER FOCUS

- ◆ Considers internal and external service stakeholders as 'customers'.
- ◆ Develops and maintains strong relationships with customers.
- ◆ Focuses efforts on discovering and meeting customer needs.
- ◆ Demonstrates a strong commitment to 'client first' and 'do what it takes' approaches to providing products, services, and support.
- ◆ Looks for ways to improve service.
- ◆ Takes personal responsibility for ensuring satisfaction.

Other/Comments

A high degree of travel is necessary for the position.

Insert any additional information here, if required. Delete this section if not needed.

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