

TEC Canada

Speaker Presentation Outline

Reinventing the CFO – what should you be getting from YOUR CFO?

Presented by Mark Neilson

The role of the CFO is often a mysterious one even amongst CFOs themselves who are not always sure what they should or could be doing. Many CFOs came up the ladder of public accounting (auditor) to accounting manager to controller to CFO where their technical backgrounds were formed and they usually consider themselves the “Chief Accounting Officer” (CAO) in their organization. The blocking & tackling functions of the office of the CFO are not optional, but many CFOs today cling tightly to the comfort zone of the CAO role leaving little room for the more value-added opportunities that their access to both information and their fellow C-suitors and the Board provide.

Through an interactive workshop, Neilson will focus on:

- What a CEO and Board should expect today from the CFO vs. the legacy role many think of;
- A different look at internal financial reporting, metrics & KPIs – INFORMATION VS. DATA
- How the CFO should pay for themselves several times over – and keep track of it!!
- A few select sub-roles of the CFO from the book “Reinventing the CFO”.

Value to Members: For TEC members

Members will leave with a set of higher, more strategic expectations of the CFO role in their company. This could lead to a dilemma and some difficult decisions. If you don't know what to expect from a CFO or YOUR CFO, this session will change that.

Speaker Biography

Mark C. Neilson, Recovering CFO

San Diego, CA

www.AccretiveSanDiego.com

Mark Neilson is the Founder and Managing Partner of Accretive with two locations – San Diego, CA and South Bend, IN. He is a self-proclaimed “recovering CFO”, a category he defined that has attracted others to Accretive “blue ocean” business model. Accretive is a firm of “Resultants”, not Consultants. Mark is a 6-year Vistage CEO group member.

By combining humor and his 25 years of experience as a CFO and Board member with large public, private-equity owned, family-owned and small private companies alike, Mark presents a high-energy, forward-thinking approach to the role of the CFO in today's business world.

Mark frequently refers to the book, ***Reinventing the CFO*** (by Jeremy Hope) to provide the framework for helping CFOs raise their game and help CEOs get a better idea of what a CFO should be (and shouldn't be) and what CEOs should expect from theirs. The book highlights how the role of the CFO has morphed from gatekeeper / defender-of-the-fort / chief accountant to Business Partner, “**Warrior of Change**”, and window for ***Better Practices*** for the organization & team they serve.

Mark began his career as a CPA with McGladreys, followed by 25 years of hands-on CFO roles in companies from \$10 million to \$1 Billion in several different industries, dealing with hyper-growth as well as survival / turnaround scenarios. Having served on ten Corporate Boards since age 30, Mark currently serves on one public company and two private company boards in addition to serving on several nonprofit boards. Mark founded Accretive in 2011 to help CFOs find cost savings without spending the time it takes to do so. In 2012, Mark helped launch the first CFO-focused Key Group with his Vistage chair in San Diego and has helped set up similar CFO groups with other peer group organizations and he continues to contribute to this new flavor of groups.

Topic Categories (used for searching in speaker database):

- **Finance & Accounting:** [Financial Management](#)
- **General Business:** Creativity / Innovation
- **Personal/Professional Development:** Leadership / Role of the CFO