



www.vertexcfo.com

(303) 810-7346

CFO ADVISOR

VertexCFO provides fractional CFO and Controller expertise to middle market and well-funded start-up companies seeking to make solid financial decisions to manage, grow or sell their companies. We specialize in making sense of complex financial information, providing CEOs and entrepreneurs sound data to run their businesses and present to their investors. We work in multiple industries and are looking for people who want to make a difference and help our clients grow.

Why work at VertexCFO?

We are focused on the success of our clients. Successful team members are highly motivated problem solvers and strong communicators — collaborators who take ownership and can manage multiple client relationships and help our clients achieve success. We make business improvements, grow with our clients, provide high-quality work and build long-term relationships.

We are seeking experienced CFOs who desire a work/life balance and flexibility, yet also have a strong desire to contribute to our company and to our client's success and growth. While we are based in Golden, Colorado, work is performed remotely and at client locations as required.

Fractional CFO Advisor: This role is a subcontractor/1099 role which provides the successful candidate a voice on our team and the ability to jointly structure a schedule that works for all parties. We source all clients, provide marketing support and processes and procedures. We work with our CFO Advisors to build a group of strong clients, with a competitive pay structure and incentives.

Key attributes:

- CPA and work experience in public accounting or multi-site experience where candidate built strong client relationships, multi-tasked, worked at different locations and managed multiple client relationships to achieve success at a high level
- Gets stuff done, proactive and maximizes value proposition
- Value-oriented — delegate work based on client value, bill based on knowledge, experience and value provided
- Continuous learner and problem solver — We don't always know everything, our strength comes from collaboration and the belief we can help and improve
- Excellent listener and strong communicator
- Relationship-focused to maintain multiple long-term client relationships
- Inclusive and strong mentor to our team
- Responsive to client questions and requests
- Ability to build complex Excel models
- This position works closely with client senior leadership and accounting staff
- Hands-on and willing to jump quickly into accounting systems, revenue recognition and GAAP issues to quickly support our clients.

- Board and investor experience
- Buy/sell transaction experience
- Strong understanding of valuations is a plus
- Working tax knowledge
- Audit background and due diligence experience
- Banking and financing experience
- Capital raise experience a plus

Responsibilities:

- Maintain multiple successful client relationships
- Manage the overall financial close process, financial statement preparation and KPI's for clients
- Mentor, manage and provide leadership to client accounting team and VertexCFO assigned team members
- Manage multiple deadlines and multi-task to meet client needs
- Conduct financial analysis
- Manage cash flow and prepare cash flow forecasting reports
- Oversight and management of accounting policies, procedures, and controls
- Board, investor meetings and presentations
- Build complex Excel budget and forecasting tools

Experience Requirements:

- CPA
- 4-year accounting degree from accredited university
- 15+ years progressive accounting leadership experience and held the title of CFO or VP of Finance
- Strong GAAP reporting and compliance background
- Financial statement preparation
- Hands-on and detail-oriented
- Ability to multi-task
- Strong communicator
- Excellent work ethic
- Integrity
- Ability to meet deadlines
- Comfortable working remotely, at client locations and motivated to collaborate with key team members to meet goals of clients
- Rate is \$80-110 per hour based on experience plus incentives.

Apply:

Email resume to Brian Medley, Principal & Founder, bmedley@vertexcfo.com