



Title: **Virtual CFO**
Location: Hybrid 50%

JOB SUMMARY

As a Virtual CFO, this position will work directly with clients to help manage their accounting and finance department, prepare financial reporting, perform financial analysis and advise on business matters. This position blends high level strategy with the tactical reviewing and monitoring of details to effectively manage financial information and solve accounting issues for our clients.

JOB DUTIES

Provide guidance and thought leadership on accounting, financial, and general advisory aspects of the client's business, including:

- Appropriate utilization and efficiency of software applications
- Development of budgets, forecasts, and KPIs
- Process improvement, standard operating procedures, and industry-specific best practices
- Coordinate and participate in year-end income tax planning and strategies.
- Ability to adapt to client needs by providing immediate short-term solutions while working toward implementation of long-term goals.
- Set and meet defined deadlines on projects with clients.
- Maintain open and honest fee discussion with clients while maintaining appropriate engagement profitability.
- Proactively participate in pursuing new business for this service while generating referrals for internal business growth.
- Maintain an active and engaging social media presence to connect with and influence target audiences, driving brand awareness and fostering community engagement.

REQUIRED EXPERIENCE / QUALIFICATIONS

- 10+ years with both public accounting and private company experience.
- Familiarity with accounting systems; background with QuickBooks and Sage preferred.
- Experience delegating work and maintaining client and other COI relationships.
- Strategic and Stakeholder leadership
- Prior Board experience
- Experience building cross functional teams
- Cross selling services to clients
- Lending and M&A leadership

TECHNICAL SKILLS

- MS Office /Windows experience particularly financial modelling and data management in Excel
- Strong analytical and problem-solving abilities
- Excellent written and verbal communication skills