

CFO STUDY GROUP

RSVP@SWENSONADVISORS.COM

CFOs and financial professionals are invited to attend this complimentary event hosted by Swenson Advisors.

This is a quarterly lunch series established to deliver forward-thinking perspectives, fresh insights and networking among CFOs and Financial Executives. The CFO Study Group provides a forum to hear from speakers on topics relevant to CFOs while enjoying stunning views and lunch at the University Club Atop Symphony Towers.



TUESDAY, JANUARY 23, 2018
UNIVERSITY CLUB ATOP SYMPHONY TOWERS
11:30AM—1:30PM

FEATURED TOPIC:

Office of the CFO as a Profit Center

Mark will help Finance executives see some different perspectives on getting better financial performance from their operations by how they might look at revenue analysis, operating expenses and how management spends its TIME. The luncheon will emphasize how the CFO can and SHOULD leverage their finance team as a profit center not an overhead center.

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.

FEATURED SPEAKER:

Mark C. Neilson, Founder
Accretive San Diego

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 an 8-year CEO peer group member and 3 year CFO peer co-facilitator.

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 RSM McGladrey, 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 10 corporate boards (starting at age 30), Mark currently serves on five for profit 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 several CFO peer group organizations and he continues to contribute to this new flavor of groups.



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