



# CFO Consulting Services

SolomonEdwards' Transaction & Regulatory Advisory Services (TRAS) practice provides accounting and finance advisory services surrounding the full life cycle of a deal for private equity firms and their portfolio companies. Within TRAS lies SolomonEdwards' CFO Consulting Services, which help CFOs accomplish goals beyond their bandwidth or expertise. Additionally, we provide both Interim CFO and Retained CFO Search Services, for situations in which a new CFO or finance executive is needed.

## CFO CONSULTING SERVICES



The CFO role continues to be critical to the success of a private equity firm's investment, as it is responsible for:

- ✓ **Ensuring that the company's accounting and finance department's duties and responsibilities are conducted efficiently and effectively.**
- ✓ **Supporting complex transactions.**
- ✓ **Partnering with the company's operations to grow the business.**

SolomonEdwards' CFO Consulting Services can assist private equity firms and their portfolio companies in situations where the existing CFO does not have the bandwidth or expertise to accomplish their goals. Our professionals have the experience and expertise to assist in critical transactions and address key business issues. We have helped numerous clients complete acquisition and financing transactions, improve efficiencies and financial reporting, and implement effective policies and procedures into their daily operations to complete successful exits. Additionally, our team partners with other SolomonEdwards service lines to bring a full-service approach to the business. We work as a catalyst to assess, execute and achieve a company's financial objectives.

We work with companies of all sizes, both publicly traded and private-owned, in an array of industries. The TRAS practice supports private equity firms and their portfolio company management teams through the various stages of a deal by working closely to help meet their strategic investment objectives. Our experienced and knowledgeable consultants provide support with pre-transaction work, deal execution, investment hold period reporting and assistance through the exiting process. A strong relationship develops between the SolomonEdwards, private equity and portfolio company management teams, which ensures that we provide operational and financial efficiencies that facilitate growth and enable strategy achievement. Depending on the nature of the project, fees are structured to provide a cost-effective solution to your business. We are always sensitive and flexible to each of our client's unique circumstances and needs.

After acquiring a portfolio company, many private equity firms find it necessary to replace the current CFO to support the growing and increasingly complex organization. We can provide you with the Interim CFO Services, as well as Retained CFO Search Services.



## INTERIM CFO SERVICES



If faced with the following situations, SolomonEdwards can assist you in identifying the right individual to fill the immediate need for a CFO on an interim basis:

- ✓ **Your company is going through a restructuring due to a merger or acquisition.**
- ✓ **The CFO has given notice.**
- ✓ **The current CFO does not have the required expertise to handle the rapid growth of the company or dynamic changes within the industry.**

Our interim CFO professionals have the experience and expertise to work as CFOs, Vice Presidents of Finance, Controllers and other key financial positions to address the current situation in any stage of the growth or the decline that the portfolio company may be experiencing. They have the breadth and wealth of experience in a variety of areas (accounting, finance, risk management, compliance, financial modeling, SEC reporting, IFRS, buy side due diligence, mergers and acquisitions and technology assessment) to quickly learn a company's operations and address the issues at hand.

## RETAINED CFO SEARCH SERVICES



The CFO position is vital to the financial security of the company and identifying the right CFO is essential to running the company. Our goal is to provide our clients with the very best talent by connecting the right executive-level candidate with the right company. We accomplish this through our highly specialized executive management search consultants who provide a proactive and research-based recruiting service that is designed to meet our clients' unique needs.

**For more information on CFO Services, please contact our practice leader:**



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### About SolomonEdwards

SolomonEdwards is a privately held, national professional services firm. Our customized solutions provide the right combination of talent, expertise and experience to help clients achieve their business objectives. Operating from strategically located U.S. markets, we serve domestic and multinational clients. The TRAS practice works closely with private equity firms, private equity-owned portfolio company clients, and corporate buyers and sellers to meet their business objectives along the full cycle of a deal. Our experienced and knowledgeable consultants provide support with pre-deal evaluation, transaction reporting, post M&A integration and regulatory compliance to ensure our clients are prepared to meet and overcome any challenges that emerge throughout the transaction.

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