



**Nexia  
Australia**

## CFO Solutions

Capability Statement



Successful organisations have a CFO who is the change catalyst. Someone who is disciplined and accountable for the organisation's financial well-being. Who manages compliance, administration, HR, legal and IT. A person who is respected as a value generating business partner.



## Our Approach

More than ever before businesses are experiencing change. This change is in the form of innovative technology, tax and regulatory compliance, millennial staff cultural shifts, globalisation, the Internet of Things (IoT) disruption, changing accounting standards and legislative requirements. Startups and small to medium size businesses need the expertise of a Chief Financial Officer (CFO).

It's time to right-size your staffing requirements, gain the necessary skill-set and experiences, and maximise financial advantage with Nexia's CFO Solutions team. We can provide a CFO on an ad-hoc (as you need) basis, to help drive more money to the bottom-line.

## Why choose CFO Solutions?

CFO Solutions can support you for a short term providing expertise to supplement your existing accounting team, to the ongoing need for an experienced CFO without the full-time cost. We bring our expertise to:

- assist your existing finance team improve their systems and processes to deliver timely and reliable financial information.
- explain in simple English where the business is at or where it is going.
- resolve an issue requiring attention where your existing accountant isn't the right person to resolve it.
- provide cover when your

incumbent finance person is leaving and you don't want to rush into finding a replacement because:

- you are not sure a replacement is required or what you want;
  - with some mentoring, other staff could step up and fill what you need; or
  - your attention is on more important issues (drive product development, chase revenue, or important negotiations) and you don't want to be distracted by recruiting.
- deliver a special project that none of your staff have the bandwidth and/or expertise to take on – you want it done right, the first time, and on time.
  - provide an independent sounding board when you're entering new territory or second guessing yourself - you'd like a second opinion or access to an experienced team that has done it before.
  - provide you with the experience and expertise of a CFO on a part-time basis to save you the expense of a full-time salary.

## The 'Next' Solution

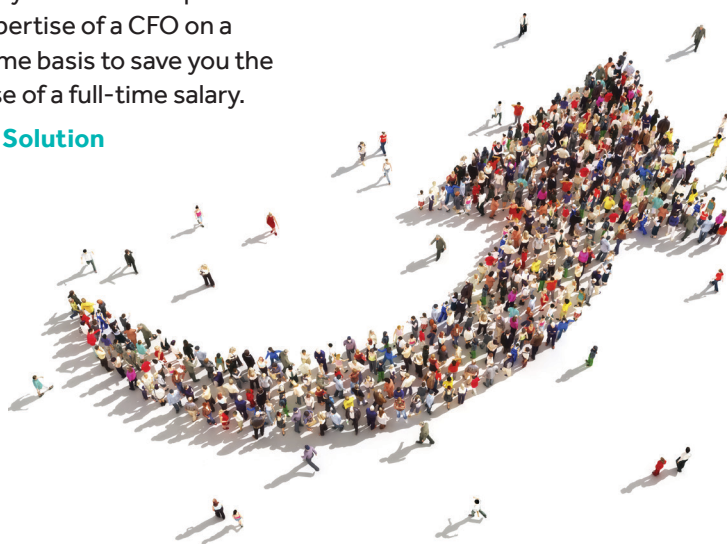
Nexia is your 'next' solution. We provide full, proactive business lifecycle management services and tailored advice for your unique needs. Our team is experienced having been there before. They listen, deliver value and the right solution for your business. We are trusted advisors.

## What to expect

You will be assigned a passionate qualified leader who has the expertise to assist with your organisation's pressing issues, whether you require advice on financial matters, a strategist to partner, or someone who can expand your network in areas that will deliver insights and value.

CFO Solutions expertly delivers services so management can concentrate on the key drivers generating revenue, making informed decisions and most importantly, growing your business.

## Knowledge and expertise





Nexia is part of a global network of accounting and consulting firms. Our offices have extensive knowledge in the following areas from which Nexia's CFO Solutions can provide specialised expertise to assist your:

### Cost and Revenue Optimisation

- review business and operating model
- analyse pricing, product, and service decisions
- R&D and Grant initiatives
- cost and procurement reviews
- reduce audit fees and receive more reliable financials
- streamline structure and optimise processes
- independent insight and focused advice
- assist bid/tender submissions

### Business Transformation

- identifying fit-for-purpose system requirements
- project managing system implementations
- agile methodology
- design and refine internal systems
- benchmarking and best practice assessments
- moving systems to the Cloud
- ICT strategy

### Reporting Framework

- developing and managing business plans, operational metrics, financial records, and cashflow management
- aligning business operations with strategic goals

- accurate and reliable reporting
- improved visibility
- modelling scenarios
- birds-eye-view of the business

### Relationships

- manage current and prospective relationships with shareholders, staff, investors, government bodies, suppliers, bankers, auditors, and partners
- corporate secretarial matters
- introduction to ecosystems of likeminded technological innovators, thought leaders, and investors
- facilitate business opportunities

### Governance

- compliance with reporting and filings
- data and financial integrity
- proactive tailored business advice
- review of taxation and corporate structures
- communication (secretarial, board, advisory, committees, and with staff)
- credibility with stakeholders and financiers

### Due Diligence

- term sheet review and negotiation
- information memorandum preparation
- preparation and establishment of diligence vault/files
- advising on contractual agreements
- risk assessment and mitigation

### Funding and Capital Raising

- developing and presenting

- financial and pitch documents
- navigate funding requirements, instruments, and agreements
- debt covenants
- cash management and strategies

### Staff Management

- right-size the organisation
- manage HR issues and risks professionally and confidentially
- full payroll function and record keeping
- mentoring, training and coaching to improve competencies
- reinvigorate and upskill staff
- cultivate continuous improvement

### Outsourcing

- cost effective transactional bookkeeping
- search for part-time accounting candidates
- legal and taxation reviews and advice
- delivering on special projects

### Problem Solver

**Growing your  
business is our  
success**

## Contact us

For further information or to discuss how Nexia Australia can assist your organisation, please contact a local Nexia Advisor below.



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