

Position Specification

Confidential Chief Financial Officer

The Company

Our client is an international real estate group of operating and investing units with offices and developments in select niche markets.

The Position

Location

Dallas, Texas

Overview

The Chief Financial Officer will be a key member of the executive team and assume a strategic role in the overall management of the company. The CFO will have primary day-to-day responsibility for planning, managing and controlling all financial-related activities for the company, as well as, participating in business development efforts. This includes direct responsibility for accounting, finance, forecasting, strategic planning, legal, property management, deal analysis, negotiations, and private and institutional financing. Specifically, this individual will work to establish a financial operating system, including all financial controls, capital markets department, property acquisition funds or partnerships and the company's portfolio financial growth strategy. The goal is to create the architecture for a scalable, multi-accounting group structure for a diversified, vertically integrated set of 10 plus operating companies. This will include activity in real estate management, development partnerships, general construction and procurement of construction materials, an architecture firm, and hospitality company.

Reporting Relationship

- The CFO will report directly to the Chairman and CEO.
- Direct reports will include the CFO of the Holdings company; CFO of Operations; Director of Finance; IT Manager.
- Other key relationships will include the Executive Vice President of Investments, Executive Vice President Director Development, Executive Vice President Director Capital Markets, Vice President People & Culture, and the COO.

Responsibilities

- Provide leadership in the development and continuous evaluation of the company's short and long-term financial plans and objectives to include debt and risk management.
- Direct and oversee all aspects of finance and accounting functions for the company; ensure these groups provide timely and accurate analysis of budgets, financial trends and forecasts.
- Provide recommendations to strategically enhance the financial performance and offer growth ideas for new business opportunities.

- Establish and maintain strong relationships with senior leaders to identify their needs and seek full-range business solutions; provide management with advice on the financial implications of business activities.
- Ensure that effective internal controls are in place and that there is compliance with GAAP and applicable federal, state and local regulatory laws for financial and tax reporting.
- Issue reports to family as well as overseeing tax preparation, distributions and debt management.
- Determine financial operating strategies and KPIs for measurement and tracking / improvement relative to variances.
- Continually improve the budgeting process through education of department managers on financial issues impacting department budgets.
- Standardize finance and accounting processes to provide consistent data and reporting across the organization.
- Top-grade and build-out the function's finance and accounting team; coach, develop, motivate and retain key talent.
- Be a financial advisor on any contracts the company may enter.

Travel

- Less than 25%

The Candidate

Education

- BS in Accounting or Finance, MBA and / or CPA highly desirable.

Professional Qualifications

- 10 + years of progressively responsible financial leadership roles, preferably in real estate development, property management, and/or construction industry.
- Experience leading within a family business.
- Extensive experience in growing an existing business and developing new business.
- Experience as a finance leader, with a proven ability to work effectively with corporate and business leadership to align strategies with the company's vision.
- Experience leading large teams.
- Solid understanding of MRI and Timberline software systems.
- Proficiency in Excel is preferred.

Personal Characteristics

- Set a clear direction for the finance function and balances vision with exceptional execution.
- Strong interpersonal skills and ability to communicate, build relationships and manage effectively at all levels of the organization, and with staff and colleagues in remote locations.
- Excellent problem-solving skills and the ability to exercise sound judgment and make decisions based on accurate and timely analysis.
- Strong "platform skills"; the ability to effectively and influentially present and sell ideas to large and small as well as internal and external groups.

- An authentic, approachable individual with high integrity, whose personal and professional values are consistent with the company's vision and culture.
- A confident, well-prepared leader with the courage to advance the organization's agenda at the senior level; a driver with a bias for action and results.
- A true team-player, coach and mentor - more focused on the success of others than himself / herself. A leader who sets high standards of performance and inspires others to perform at their best. Rigorously builds the team and manages a well-defined succession plan. Provides both positive and constructive feedback to all peers and subordinates and will effectively mentor the next generation of leaders. A collaborative leader who works well with others and can motivate and cooperate across functions.
- Is calm under fire and can handle complexity, multiple demands and pace while staying level-headed and professional.
- A collaborative facilitator who develops relationships and loyalty with his / her colleagues across all functions, levels and business lines, serving as an inspirational coach, leader, colleague, and culture champion within the company.
- A leader and team-oriented consensus builder who understands how to achieve buy-in from diverse constituencies.

To learn more about this opportunity or provide a confidential referral, please contact:

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