

OVERCOME YOUR BARRIERS TO GROWTH

Allied Consulting Group CFO Roundtable



A Fresh Vision

Allied CFO Roundtables are peer-based member-only groups. Allied helps members grow both personally and professionally in their roles as business leaders. Direct meetings with CEOs and CFOs throughout Wisconsin, identified a growing set of similar development needs for financial executives including:

- Hearing from expert speakers
- Learning and sharing best practices
- Engaging in one-on-one coaching
- Improving business development skills
- Enhancing soft skills and presentation skills
- Growing and mentoring department staff



Format

Each CFO Roundtable is led by a financial expert and trained facilitator, with the total number of active members not to exceed 12 people.

- 6 meetings per year 8 a.m. to 3 p.m., with 3-4 speakers per year.
- 6 one-on-one meetings per year with a trained facilitator.
- 1 overnight retreat and a tentative social calendar.
- Focus will be on best practice, issue presentation and follow up.
- Meetings conducted at Member's place of business with a continental breakfast and light lunch.



Potential Roundtable members are evaluated privately by the chair and presented to the existing members for consideration. There are no competing members or direct areas of conflict. CFO Roundtables expect strict confidentiality between members in and of group meetings. This includes both personal and professional interactions.

CFO Roundtable Difference

While there are existing discussion groups and management roundtables throughout Wisconsin, Allied's CFO Roundtables include:

- A trained facilitator who is an experienced CFO
- A well-structured and organized meeting that includes guest speakers that allow members to invite staff to listen and grow.
- A formal, issue-processing systems that allows for constructive and actionable steps developed from the group's insight.



Membership Qualifications

Membership in Allied CFOs is by invitation-only. Members include top financial managers, CFOs, VPs Finance, and Controllers. Dues are \$7,000 annually, paid quarterly in advance. Founding Member dues will be guaranteed through 12/31/2017.

New Roundtables begin November 16, 2016. Members will receive peer insights and best practices, share actual experience, and lessons learned and how they deal with the "unexpected". Allied's CFO Roundtables will return a 10x or greater return on both your financial and personal development.

To learn more arrange a one-on-one informational call or meeting reach out to John Howman at (262) 724-6668.