



arizona chapter

*connecting financial executives*

# 2024 CFO of the Year Nomination

FEI Arizona Chapter  
70 S. Val Vista Dr., #A3-602  
Gilbert, AZ 85296  
[admin@feiaz.org](mailto:admin@feiaz.org)

## **Submissions:**

- Complete nomination form in its entirety and return to the address above or by email to [admin@feiaz.org](mailto:admin@feiaz.org)
- **Deadline for submissions is 5:00 pm August 2, 2024.**
- The information will be kept confidential and will be used only by the panel of judges.

## **Qualification and eligibility guidelines:**

- Nominee must be the Chief Financial Officer or equivalent.
- Nominee from a for-profit company must have revenue of \$20 million or greater, and non-profit must have revenue of \$10 million or greater.
- Nominee must be based in an Arizona office.
- Nominee must have held their role with their current employer for a minimum of 2 years as of August 1st, 2024.
- All nomination must be acknowledged and endorsed by the nominee and the nominee's Chief Executive Officer.

## **Other important Information:**

- A Nominee Reception will be held in late September 2024. This is the only opportunity for the judges to meet with the nominees. It is highly encouraged that the nominee attends the event (once date is set, the nominees will be notified).
- The CFO of the Year Event will take place on November 6, 2024.

## **Award Criteria**

- |   |
|---|
| <ul style="list-style-type: none"><li>❖ <b>Leadership</b></li><li>❖ <b>Strategic Vision and Planning</b></li><li>❖ <b>Communication Skills</b></li><li>❖ <b>Adaptability</b></li><li>❖ <b>Financial Performance</b></li></ul> |
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# **Nomination Form**

## **1. Nominee Overview:**

- Name
- Title
- Organization
- Public, Private or Non-Profit
- Total FTE's
- Date of Employment
- Business Address
- CFO Email
- CEO's name and contact information.
- Education and Certifications
- Current Community and Board Involvement
- Brief Description of areas of responsibility and number of staff (half page or less)

## **2. Award Criteria**

**Based on the past two years, please give examples of how your CFO has excelled in the following areas. Please keep your comments to three pages or less.**

**Leadership-** Strong leadership skills are essential for a CFO to effectively lead their team and collaborate with other departments. How does your CFO inspire confidence, foster a culture of accountability, and empower the team to excel?

**Strategic vision and planning-** CFO's must understand how financial strategies align with overall business goals. To do this CFO's must understand market trends and anticipate future challenges and opportunities. How has your CFO developed financial strategies that position your company for success.

**Communication Skills-** CFO's often need to communicate complex financial information to stakeholders who may not have a finance background. The ability to convey financial information to all stakeholders clearly and persuasively is critical for building trust and gaining support for financial initiatives. How has your CFO demonstrated their communication skills? How has your CFO partnered with other leaders in your business to effectively communicate and drive collaboration across the business, using financials to tell the story and align with operational and sales metrics?

**Adaptability-** A CFO must be agile in response to changing circumstances. How has your CFO shown to be open to new ideas, willing to embrace innovation and able to pivot quickly when necessary?

**Financial Performance** In an effort to consistently evaluate financial performance please provide a summarized income statement and balance sheet for the past three fiscal years. A financial template has been provided for you to customize for your operations. For public companies, please provide your summarized, audited financials. On a separate page please explain any significant variance that will help to understand your company's financial performance over the past three years. Financials will only be shared with the judges and FEI CFO of the Year Committee Chair. A separate non-disclosure agreement has been attached to ensure confidentiality. If you have any questions regarding the financials or financial presentation, please contact Julie Shaw at [Jshawcfo@gmail.com](mailto:Jshawcfo@gmail.com)

### **3. Checklist**

\_\_\_\_\_ Include a link to the nominee's personal and organization's profile.

\_\_\_\_\_ Include a digital professional photo (300 dpi)

\_\_\_\_\_ Include three years of summarized financial reports.

<b>Company Name</b>							
<b>Fiscal Year</b>							
<b>in (000)</b>							
				<b>\$ Variance</b>		<b>% Var</b>	
	<b>Year 3 (Current)</b>	<b>Year 2</b>	<b>Year 1</b>	<b>Yr 3 vs Yr 2</b>	<b>Yr 2 vs Yr 1</b>	<b>Yr 3 vs Yr 2</b>	<b>Yr 2 vs Yr 1</b>
<b>Assets</b>							
Cash				\$ -	\$ -		
Account Recievable				-	-		
Allowance for Doubtful Accounts				-	-		
<b>Net AR</b>	\$ -	\$ -	\$ -	\$ -	\$ -		
Inventory				-	-		
Other Current Assets				-	-		
<b>Total Current Assets</b>	\$ -	\$ -	\$ -	\$ -	\$ -		
<b>Fixed Assets</b>							
Asset Type 1				-	-		
Asset Type 2				-	-		
Asset Type 3				-	-		
Depr/Amort				-	-		
<b>Net Fixed Assets</b>	\$ -	\$ -	\$ -	\$ -	\$ -		
Other LT Assets				-	-		
<b>Total Assets</b>	\$ -	\$ -	\$ -	\$ -	\$ -		
<b>Current Liabilities</b>							
Accounts Payable				-	-		
Accrued Payroll/Taxes				-	-		
Other Current Liabilities				-	-		
<b>Total Current Liabilities</b>	\$ -	\$ -	\$ -	\$ -	\$ -		
<b>Long Term Liabilities</b>							
LT Liability 1				-	-		
LT Liability 2				-	-		
<b>Total LT Liabilities</b>	\$ -	\$ -	\$ -	\$ -	\$ -		
<b>Total Liabilities</b>	\$ -	\$ -	\$ -	\$ -	\$ -		
<b>Total Equity</b>				\$ -	\$ -		
<b>Total Liabilities and Equity</b>	\$ -	\$ -	\$ -	\$ -	\$ -		
<b>Current Ratio</b>							
<b>Debt To Equity Ratio</b>							
<b>Debt Ratio</b>							

Company Name							
Fiscal Year							
in (000)							
				\$ Variance		% Var	
	Year 3 (Current)	Year 2	Year 1	Yr 3 vs Yr 2	Yr 2 vs Yr 1	Yr 3 vs Yr 2	Yr 2 vs Yr 1
<b>Revenue</b>							
Revenue Stream 1				-	-		
Revenue Stream 2				-	-		
Revenue Stream 3				-	-		
Revenue Stream 4				-	-		
Revenue Stream 5				-	-		
Total Revenue	\$ -	\$ -	\$ -	\$ -	\$ -		
<b>COGS</b>							
Payroll /Benefits/Taxes							
Non-Payroll							
Expense Category 1				-	-		
Expense Category 2				-	-		
Expense Category 3				-	-		
Total Non-Payroll	\$ -	\$ -	\$ -	\$ -	\$ -		
Total COGS	\$ -	\$ -	\$ -	\$ -	\$ -		
Gross Profit	\$ -	\$ -	\$ -	\$ -	\$ -		
Gross Profit Margin							
<b>Admin and Support</b>							
Payroll /Benefits/Taxes				-	-		
Non-Payroll							
Expense Category 1				-	-		
Expense Category 2				-	-		
Expense Category 3				-	-		
Total Non-Payroll	\$ -	\$ -	\$ -	\$ -	\$ -		
Total Admin and Support	\$ -	\$ -	\$ -	\$ -	\$ -		
Total Expenses	\$ -	\$ -	\$ -	\$ -	\$ -		
EBITDA	\$ -	\$ -	\$ -	\$ -	\$ -		
EBITDA Margin							
Depr/Amort				-	-		
Interest Income/Expense				-	-		
Other Non-Operating Income/Exp				-	-		
Total Non Operating Income/Exp	\$ -	\$ -	\$ -	\$ -	\$ -		
Net Income	\$ -	\$ -	\$ -	\$ -	\$ -		
Net Income Margin							