



Timely insights and cutting-edge  
resources for chief financial officers

# Introduction

The scope of the CFO's job has expanded mightily over the years, well beyond traditional functions like accounting and budgeting. Chief financial officers today influence nearly all aspects of operations. In doing so, CFOs have both a pragmatic and strategic role to play and are expected to bring objective and realistic views to business discussions while helping pave the way for their organization to create value for shareholders and other stakeholders.

It's a big ask.

The CFO Program is designed to inform chief financial officers to meet—and exceed—the growing list of demands. Through its offerings, the program provides CFOs with information and insights to address issues confronting the finance function and the broader enterprise. The program's flagship events, both onsite and virtual, provide an opportunity for CFOs to make genuine connections with their peers. In these settings, CFOs are able to compare notes, share pain points, trade stories, and learn from one another. Such networking can prove to be invaluable as CFOs look to solve often complex problems—and make important decisions about their own careers.

## The CFO Program mission:



### Inform

Provide an extensive and timely catalogue of CFO-focused content to educate CFOs so they can reach both business goals and career aspirations.



### Connect

Connect CFOs with peers and subject-matter resources across a wide range of issues.



### Advance

Help develop CFOs' hard skills—and soft skills—so they can develop and lead finance organizations, influence other business leaders, and expand their own career opportunities.

# An overview of the CFO Program offerings



## Inform

### **CFO Signals™**

A quarterly survey that tracks CFO thinking—representing North America's most influential companies—across four areas: business environment, company priorities, finance priorities, and personal priorities.

### **CFO 4Sight**

A regular series of virtual events to discuss the economic outlook, trends in finance, and pressing challenges facing CFOs today.

### **CFO Insights**

A publication that tackles pressing challenges facing finance executives today, delivered in an easily digestible format.

### **CFO Journal**

Deloitte's exclusive arrangement with *The Wall Street Journal* includes a regular stream of CFO-centric content and timely features, which appear on WSJ Digital.



## Connect

### **CFO Vision™**

An exclusive conference offering CFOs the opportunity to learn about timely topics from thought leaders in business, politics, and the media while offering peer networking.

### **CFO Peer Forums**

Opportunities for small groups of CFOs to meet periodically and discuss issues of importance in a safe, informal environment.

### **Executive Women in Finance**

A community of women from past, current, and future CFO Program offerings that help each other network, grow, and thrive.



## Advance

### **Next Generation CFO Academy™**

An executive development experience for future CFOs, offering an experiential curriculum and unparalleled networking opportunities.

### **Finance Leadership Program™**

Development programs for individual organizations across a spectrum of industries or marketplace locations, designed to advance leadership skills and take their organizations and careers to the next level.

### **CFO Transition Lab™**

A one-day experience that helps CFOs make efficient and effective transitions into new roles or strategies.

### **CFO-in-Residence**

Deloitte has used retired CFOs as independent senior advisors for the CFO Program, delivering insights and additional value to Deloitte clients.



# Inform

## ***CFO Signals™***

Since 2010, Deloitte's quarterly *CFO Signals™* survey has tracked the sentiment and actions of CFOs at many of North America's largest and most prominent organizations. By and large, three-quarters of the companies represented by respondents are publicly traded, and roughly one-quarter generate average annual revenues of at least \$10 billion. The survey features CFOs' responses to questions seeking their expectations for economic, investment, performance, and other key indicators. In addition, each quarter's survey focuses on a timely, top-of-mind issue for CFOs. The results provide insights into what CFOs are anticipating and thinking, and equally important, what they are doing to address matters that are critical to their organizations, finance teams, and their own careers.

The survey explores CFOs' perspectives in four areas:

- Business environment
- Financial prospects
- Finance function priorities
- Career and talent priorities

### **Learn more**

For additional information, visit [www.deloitte.com/us/cfosignals](http://www.deloitte.com/us/cfosignals)

### **Contact**

#### **Patricia Brown**

Managing Director and Survey Director, *CFO Signals™*  
Deloitte LLP  
[pabrown@deloitte.com](mailto:pabrown@deloitte.com)

## **CFO 4Sight**

If CFOs deal with one constant, it is this: change. Breakthrough technologies, new competitive threats, geopolitics—all arrive on an almost regular basis, presenting CFOs with new and pressing demands. But while change brings challenges, it also presents opportunities. Seizing such openings not only requires ground-level information, but also a close look at trends and what's ahead. CFO 4Sight, a quarterly webcast, provides exactly this kind of forward-looking, big-picture view.

Each CFO 4Sight livestream features:

- Interviews with chief financial officers on timely matters.
- CFOs' expectations for key regional economies, capital markets, and their own companies.
- Economic news and analysis.
- Polls that gather CFOs' views on myriad issues.

### **Contact**

#### **Mike Licata**

Sr. Marketing Manager  
Deloitte Services LP  
[mlicata@deloitte.com](mailto:mlicata@deloitte.com)



# Inform

## **CFO Insights**

*CFO Insights*, a biweekly Deloitte publication with 37,000-plus subscribers, takes a CFO-centric look at issues facing large and midsize organizations. Decidedly practical, *CFO Insights* details what finance chiefs may want to consider when addressing challenges such as disruptive technologies, changes in workforce models, rising costs of capital, supply chain shortages, and globalization.

In a 10-minute read, each issue of *CFO Insights* looks at some developments challenging today's CFOs, explores their implications for organizational effectiveness, and offers pragmatic considerations to help CFOs identify, for example:

- How the finance function can help resolve challenges facing the broader organization.
- What CFOs can do to deploy finance resources to address their organizations' strategic priorities.
- Ways CFOs can work with other C-suite and business leaders in tackling operational constraints.
- Steps CFOs can take to create value for shareholders and a range of other stakeholders.

View the full library of *CFO Insights* articles, and subscribe today at [www.deloitte.com/us/cfoinsights](http://www.deloitte.com/us/cfoinsights).

### **Contact**

#### **Josh Hyatt**

Editor and Manager, CFO Program Journalist  
Deloitte LLP  
[jhyatt@deloitte.com](mailto:jhyatt@deloitte.com)

## **CFO Journal**

Throughout the business week, *CFO Journal*, a Deloitte-sponsored module on *The Wall Street Journal* digital platform, offers content designed for chief financial officers and other C-suite executives. Topics covered span the many domains of the finance function, such as FP&A, capital allocation, compliance, treasury, and M&A. Deloitte content in *CFO Journal* also features interviews of finance chiefs and other senior executives, trends uncovered by proprietary research, and analysis of the CFO Program's quarterly *CFO Signals*™ survey to provide a view into the sentiment, expectations, and concerns of finance chiefs.

Other features include:

- Practical insights for finance executives and their teams.
- Editorial analysis of news and events that impact the finance function.
- Industry-specific articles.
- Daily Morning Ledger newsletter covering business developments.
- CFO community connections.

Note: *The Wall Street Journal* news department is not involved in the creation of Deloitte content.

### **For more information**

To view Deloitte content in the *CFO Journal*, visit <http://deloitte.wsj.com/cfo/>.

### **Contact**

#### **John Labate**

Senior Manager, *CFO Journal* Editor  
Deloitte Services LP  
[jolabate@deloitte.com](mailto:jolabate@deloitte.com)

# Connect

## CFO Vision™

CFO Vision™, Deloitte's flagship event for chief financial officers, has been a rich source of business intelligence for chief finance officers for more than 25 years. CFO Vision™ offers attendees an opportunity to connect with peers and learn from some of the most prominent voices in business and leadership. Each year, CFO Vision™ unpacks the constantly changing, often complex issues that sit at the top of the agenda for finance executives, as well as the impact on their role and remit.

CFO Vision™ features both plenary sessions and peer circles. In peer circles—smaller, focused sessions with an emphasis on participant interaction—CFOs can gain insights from both Deloitte subject-matter resources and other CFOs.

CFO Vision™ offers a distinct experience for chief finance officers, including:

- In-depth analysis of global and regulatory issues.
- Peer networking.
- Plenaries featuring prominent external speakers.
- Industry-specific dinners and breakfast sessions.

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### Contact

#### Alexandra Pace

Manager, CFO Program  
Deloitte LLP  
[alepace@deloitte.com](mailto:alepace@deloitte.com)

## CFO Peer Forums

Deloitte's CFO Peer Forums have a singular mission: to connect CFOs with their peers. Delivered in both live and virtual environments, forums can be aligned by local market, industry, public/private CFOs, or a specific challenge. The gatherings offer CFOs a setting intended to foster an open exchange of ideas while providing access to thought leaders who can serve as a sounding board.

The conversations at CFO Peer Forums can serve as a valuable resource and guide to CFOs as they confront a range of challenges. Sessions are designed to cover topics of interest to CFOs, including technology disruption, the global economy, talent, risk management, sustainability, and finance transformation, among others. The forums also offer ample time for networking and sharing of insights and potential solutions to pressing challenges.

### Sponsored forums

In addition to CFO Peer Forums, Deloitte sponsors the Fortune CFO Collaborative, a periodic gathering of finance leaders at events facilitated by editors from Fortune Media and featuring finance leaders as guest speakers.

### Contact

#### Jessica Day

Managing Director, CFO Program  
Deloitte LLP  
[jday@deloitte.com](mailto:jday@deloitte.com)

# Connect

## Executive Women in Finance

With the goals of fostering peer connections and helping develop the current and next generation of women finance leaders, the CFO Program created Executive Women in Finance. The program aims to both engage and support women leaders in finance and the C-suite, offering a community where women can network, grow, and gain perspectives and insights so they can advance their careers.

The Executive Women in Finance offering features:

- Research to help organizations understand the representation of women in finance leadership positions, and what can be done to help build the pipeline to meet organizational challenges.
- Opportunities for women taking part in a Deloitte Next Generation CFO Academy™ to meet CFOs from leading organizations and discuss top-of-mind issues.
- Events held in various locations that bring together CFOs and executives who have participated in our Next Generation CFO Academies, Finance Leadership Program, and CFO Vision.
- Support for newly appointed women CFOs in making an efficient and effective transition, drawing on our specially designed CFO Transition Lab™.
- A reception for women attendees at CFO Vision to meet with guest speakers.

### Contact

**Carrie Cristinzio**

Partner

Deloitte & Touche LLP

[ccristinzio@deloitte.com](mailto:ccristinzio@deloitte.com)



# Advance

## Next Generation CFO Academy™

Next Generation CFO Academies are distinctive experiences designed for finance executives who are nominated by their organization's CFO to gain the leadership, business, and communications skills expected of CFOs today. The Academies offer an experiential curriculum with networking opportunities. Sessions are held semi-annually at Deloitte University, Deloitte's Leadership Center, in Westlake, Texas.

### Academy I

The responsibilities of today's CFO extend far beyond the traditional support function. Finance touches every aspect of the business. CFOs are key decision-makers—leaders in the organization who are expected to meet high standards. Finance executives who aspire to the CFO role must be ready for the challenge.

The Next Generation CFO Academy™ I experience is framed around three pillars of CFO success: leadership, influence, and competence. Delivered through two virtual sessions followed by a live session at Deloitte University, the Academy I experience is both intense and thorough. It offers executives an opportunity to prepare for what the CFO's job entails, engage in self-reflection, and participate in hands-on scenario planning related to key aspects of the CFO agenda.

### Academy II

The qualities of a great finance leader go beyond the numbers. The most effective CFOs tend to bring a level of confidence to the role—a confidence based on their ability to demonstrate integrity, clarity of thinking, and a sound business sense.

Deloitte's Next Generation CFO Academy™ II is designed to help develop this model of confidence. Over an intensive three-day session at Deloitte University, Academy II focuses on helping participants gain the capabilities needed for extraordinary leadership. That includes developing strong communication skills needed to address tough situations with media and help participants develop their presence as a confident leader.

The faculty members for CFO Next Generation Academies are selected based on skills that align with various aspects of the curriculum, and include C-suite executives, analysts, ratings agency executives, authors, university professors, attorneys, and senior Deloitte leaders.

The Academy is offered to a wide range of clients, offering participants an opportunity to build meaningful relationships with peers from other organizations across industries and geographies.

### Contact

#### Lori Huver

Senior Manager, CFO Program  
Deloitte LLP  
[luver@deloitte.com](mailto:luver@deloitte.com)

Inquiries also may be sent to [nextgencfoacademy@deloitte.com](mailto:nextgencfoacademy@deloitte.com).

# Advance

## Finance Leadership Program™

Modeled after the curriculum of Deloitte's Next Generation CFO Academies, the Deloitte Finance Leadership Program™ is designed to help finance executives further develop their leadership, communication, and decision-making skills. This program offers practical insights and guidance that can help CFOs and finance leaders take their organizations—and their careers—to the next level.

Designed either for individual organizations across a spectrum of industries or marketplace locations (e.g., finance leaders from several companies in a particular locale), the Finance Leadership Program™ focuses on leadership, influence, and competence, and can include:

- Professional and personal development through experiential learning exercises that can help finance professionals advance to the next level of leadership.
- Perspectives and guidance provided directly by executive leaders in the participant's own organization.
- Insights from prominent Deloitte subject-matter specialists on topics related to strategic aspects of finance.

These programs can apply to finance executives who have been identified by their organization as "high potential" leaders. Participants may hear directly from local CFOs, board directors, and leaders, with Deloitte subject-matter specialists sharing insights on topics relevant to today's CFO. The format can vary by location, and ranges from a concentrated one-day event to multiple sessions spread over the course of a year.

### Contact

#### Lori Huver

Senior Manager, CFO Program

Deloitte LLP

[lhuver@deloitte.com](mailto:lhuver@deloitte.com)

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# Advance

## CFO Transition Lab™

Boards and CEOs are calling upon CFOs to expand their leadership capabilities and serve as strategic partners to their organizations. At the same time, chief financial officers are increasingly overseeing other critical matters related to business strategy.

Deloitte's CFO Transition Labs are specifically designed to help newly appointed CFOs—including those with prior CFO experience—make efficient and effective transitions to the expanding demands of the role.

### Map the next six months of your journey—in one day

Labs are one-day sessions based on the CFO Program's extensive research that offer a tailored experience to help finance leaders navigate their new role. The Lab agenda focuses on the three most important resources CFOs should manage during times of significant change: personal and organizational time management, talent in the finance organization, and critical stakeholder relationships.

### The Labs can help CFOs create a tangible 180-day work plan with four workstreams:

- Define and communicate priorities
- Assess and develop a talent strategy
- Understand and influence specific stakeholders
- Frame concrete actions to achieve priorities

### In the Lab, participants can explore:

- **Hopes, fears, and legacies:** Define a "North Star" and assess alignment with the CEO's agenda.
- **Finance organization strengths:** Evaluate the finance organization's current versus desired strength in key areas.
- **Priorities:** Use Deloitte's Four Faces of the CFO framework to identify priorities and classify the urgency and importance of each.
- **Communication strategies:** Develop language to communicate strategic priorities to stakeholders.
- **Confidence:** Assess the preparedness of the finance organization to execute top priorities, and identify ways to increase confidence in outcomes.
- **Talent:** Examine capabilities and bandwidth of direct reports to support identified priorities, as well as the scope and efficacy of reporting relationships.
- **Relationships:** Focus on the strengths of key relationships, and influence strategies needed to achieve priorities.
- **180-day plan:** Create action plans with specific milestones.

### Contact

#### Michael Aronesty

Partner, CFO Transition Lab™ Leader  
Deloitte & Touche LLP  
[maronesty@deloitte.com](mailto:maronesty@deloitte.com)



# Advance

## CFO-in-Residence

Deloitte's CFO-in-Residence is an independent advisor working with The CFO Program. Currently, Frank D'Amelio, former executive vice president and chief financial officer at Pfizer Inc., serves in this role. As an independent advisor, Frank works with clients, senior leadership, and Deloitte teams, providing his strategic guidance on the finance function and the evolving role of the CFO.

The CFO-in-Residence is involved in a broad range of activities across The CFO Program, including playing a key role in CFO Transition Lab™ sessions, CFO Forums, Deloitte's annual CFO Vision™ conference, and the CFO Program's Next Generation CFO Academies. Frank D'Amelio also lends his experience and insights to Deloitte's quarterly *CFO Signals*™ survey and CFO 4Sight webinar, biweekly *CFO Insights* series, and articles appearing in Deloitte's module on the digital *Wall Street Journal's CFO Journal*.

*"Deloitte's CFO Program has long been recognized for its prestige in advising current and future finance leaders through the challenges of a continually evolving business landscape. I am honored and excited to become the CFO-in-residence of this world class program as we continue the mission of advising CFOs through the complexities of the role."*

— Frank D'Amelio, independent senior advisor,  
US CFO Program, Deloitte LLP

*"Given his vast experience as a CFO, including having helped lead Pfizer through the global COVID-19 pandemic, Frank D'Amelio brings a wealth of knowledge and insights, as well as the skill set required to advise CFOs through their most pressing obstacles. We are thrilled to formally welcome Frank to the CFO Program team as our CFO-in-residence."*

— Steve Gallucci, national managing partner,  
US CFO Program, Deloitte LLP

### Contact

#### Jessica Day

Managing Director, CFO Program  
Deloitte LLP  
[jday@deloitte.com](mailto:jday@deloitte.com)

# Program Contacts

**Steve Gallucci**

National Managing Partner,  
US CFO Program  
Deloitte LLP  
[sgallucci@deloitte.com](mailto:sgallucci@deloitte.com)

**Jessica Day**

Managing Director,  
US CFO Program  
Deloitte LLP  
[jday@deloitte.com](mailto:jday@deloitte.com)

**About Deloitte's CFO Program**

The CFO Program brings together a multidisciplinary team of Deloitte leaders and subject-matter specialists to help CFOs stay ahead in the face of growing challenges and demands. The Program harnesses our organization's broad capabilities to deliver fresh and forward-thinking insights for every stage of a CFO's career—helping CFOs manage the complexities of their roles, tackle their company's most compelling challenges, and adapt to strategic shifts in the market.

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