

# CFO Solutions

## *Building a High-Powered Team engagement syllabus*

### Organization design & compensation

	Week 1	Week 2	Week 3	Week 4
	Organization design assessment	1:1 with CFO	Compensation structures	1:1 with CFO
Description	Identifying the gaps: How to assess what positions are needed in your company.	Workshop: Developing a realistic plan to meet your current and future staffing needs.	Compensation planning systems: W2, 1099, and aligning incentives.	Workshop: Review future design of comp plans holistically (W2 vs. 1099 and bonus).
Activity	Group WebEx	1:1 with CFO	Group WebEx	1:1 with CFO
Resources	Job descriptions (Investment News version)	Deliver results of affordability analysis	Compensation structure examples for future reference	Compensation assessment and bonus review
Homework	Describe your vision of your firm from today through retirement (AUM/rev/number of relationships) and the support you believe it will take to get there.		Complete Compensation Questionnaire for Staff	
Advisor Deliverables	Before classes begin: Provide P&L, balance sheet and cash flow statement to CFO Solutions, plus other KPIs, firm history, context, and constraints.			

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### Team support and long-term retention

	Week 5	Week 6	Week 7	Week 8
	<b>Career pathing for employees and reviews</b>	<b>1:1 with CFO</b>	<b>Retention, equity, and succession strategies</b>	<b>1:1 with CFO</b>
<b>Description</b>	Developing a long-term vision for your employees and performance reviews.	Design career paths and performance reviews in your firm.	Discover high-performer retention strategies: Synthetic vs. real equity.	Designing a G2 exit plan. Discuss course takeaways.
<b>Activity</b>	Group WebEx	1:1 with CFO	Group WebEx	1:1 with CFO
<b>Resources</b>	Sample career pathing	Performance review framework	W2 white paper	G2 equity model
<b>Homework</b>	Describe one employee and your vision for his or her long-term career trajectory.		Describe your exit plan	