



# CFO vs Controller Checklist

## CFO Expertise

- ☐ Mergers and acquisitions, valuation
- ☐ Investment and tax structuring
- ☐ Cross-border initiatives
- ☐ Initial public offerings
- ☐ Executive leadership with CEO
- ☐ Enterprise risk management
- ☐ Investor relations and roadshows
- ☐ Goal setting and KPIs
- ☐ Advanced Powerpoint and Excel
- ☐ Contract reviews
- ☐ Managing auditors
- ☐ Competitor and industry analysis
- ☐ Capital markets and economic analysis
- ☐ Base salary \$150,000 to \$325,000

## Controller Expertise

- ☐ Full-cycle accounting
- ☐ Receivables and payables management
- ☐ Management reporting
- ☐ HST and payroll compliance
- ☐ Financial management
- ☐ Internal controls
- ☐ Managing credit facilities
- ☐ Creating dashboards
- ☐ Advanced Excel
- ☐ Vendor reconciliations
- ☐ Assisting auditors
- ☐ Prepare internal and external financials
- ☐ Commercial banking relationships
- ☐ Base salary \$80,000 - \$200,000

**We offer fractional CFO and Controllership services for clients that can clearly define their scope of work.**