



FINANCE · ACCOUNTING · HR

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Executive Advisory Services **Credit Unions and Community Banks**

In the dynamic world of finance, credit unions and community banks face unique challenges. The need for experienced leadership and strategic guidance is critical. Our Executive Advisory Services are here to empower your organization with seasoned expertise and tailored solutions to ensure effective Board leadership, improved CEO performance and appropriate response to audit and examiner concerns.

We understand that every organization has unique needs. Our flexible business model offers solutions designed for your institution, which can include board training events, weekly CEO coaching calls, or monthly strategic planning sessions.

EXECUTIVE ADVISORY SERVICES **CORE SERVICES**

Interim CEO

Charles River CFO offers experienced C-Suite professionals to fill leadership gaps during transitions, turning challenges into opportunities. Our Interim CEO and Interim CFO services provide the industry and managerial expertise to shepherd through a crisis, steady the day-to-day operations, and support the Board of Directors and staff. Finding the optimal permanent solution takes 6-12 months—often longer, depending on the organization. We ensure your organization stays on course while you search for the right permanent solution.

Board Leadership Training

Board leadership is crucial to the success of any financial institution. Our Executive Advisory Services provide comprehensive board training, defining responsibilities, delivering financial review training, and guiding interactions with auditors and examiners. We believe in empowering your board to make impactful decisions that drive your organization's success.

Audit Committee

We work with your Audit Committee to define member responsibilities pertaining to internal audits and examinations. We identify the process for evaluating CEO responses, define procedures for review of audit/examination issues and ensure the Board is effective at monitoring improvements.

Strategic Planning

Strategic planning is an integral part of any organization's growth. Our Executive Advisors provide insights on best practices for successful plan development, execution, and monitoring, ensuring your organization has an effective planning and budgeting process in place.

Examination and Audit Support

We understand your banking and credit union regulatory environment and reporting requirements. We work with your team to identify and remedy issues raised during the audit process. From executive advisory support to outsourced financial and accounting services, we work with your team to minimize financial issues and concerns.

CEO Coaching

Effective communication is key to any successful organization. Our Executive Advisors offer CEO coaching, working closely with your CEO to optimize their effectiveness in communicating with the board, outside examiners, and senior management. This could be through weekly consultative calls or monthly meetings, depending on your organization's needs.

We are smart, nimble, and flexible, offering seasoned CEO expertise to improve communication, strategic leadership, and accountability in your organization. Our Executive Advisory Services are designed to support your leadership team, helping you focus on the critical tasks and growing your institution.

Let us help you upgrade your effectiveness as a board or CEO today. Our team is ready to provide the expertise and support that your credit union or community bank needs to thrive in the ever-changing financial world. Connect with us to learn how our Executive Advisory Services can benefit your organization. Send us an email to info@crcfo.com or call Jack Sullivan, Vice President, Business Development, at (781) 431-0420 x1.