



**Contact:** Terry McCarthy  
(949) 716-3524  
[tmccarthy@prodigysearchgroup.com](mailto:tmccarthy@prodigysearchgroup.com)

**Position:** Chief Financial / Operations Officer  
**Reports to:** Founders  
**Industry:** Interior Design  
**Location:** Santa Ana and Newport Beach, CA

### **Company Overview:**

Our client is a full-service interior design studio and e-commerce shoppe based in Newport Beach, CA. They create inspired spaces, products and experiences that encourage people to live deeply in each moment through fresh, functional, family-friendly design. They first opened their doors in 2015, but have since evolved into a national lifestyle brand.

They believe that great design begins with a clean and natural palette, quality furnishings, artisan textiles, layered neutrals and nature-inspired decorative accessories. In five short years, they have built a deep roster of residential & celebrity clients, a cultivated a highly-engaged social media community, and have been consistently recognized by their peers and the media for their designs & evolved business model.

### **Job Description:**

The Chief Financial Officer (CFO) will lead an exceptionally talented team, managing 3-5 direct reports and a team of 9-12 staff altogether. This is a high-profile and extremely collaborative position, partnering with senior leadership and executives to drive collective impact and synergize the operational side of the business. Reporting to the Owner/Executive Team, the CFO will also work closely with Business Consultants, including Outside Counsel, CPA, and Finance and Accounting teams. They will manage an annual budget, with overall strategic and operational responsibility for finance, operations, facilities, and information technology departments. This includes financial responsibility of facility management, including leases, assets, equipment, etc. This position will lead, mentor and partner with the People Function to facilitate and implement positive change, accountability and engagement.

### **Essential Duties and Responsibilities:**

- Become an influential and trustworthy thought partner with owners
- Lead by example, mentor leaders and elevate their managing practices and approach
- Establish Weekly/Monthly/Quarterly cadence with outsourced accounting team (SNA), creating visibility inside PS of ongoing activities and deliverables
- Finalize accounting process fixes around revenue recognition, procurement credit card reconciliation, outbound freight reconciliation and customer returns/credit memos
- Write E2E accounting resource handbook (SOP), documenting all processes and procedures with screenshots, workflows, etc.

- Create full FP&A blended actuals/forecasting model split by month and profit center and outline cadence updates and deliverables moving forward
- Near term design forecast should be at customer level
- Use results of actuals modeling and forecast to recommend any changes to business structure or business lines
- Implement Avalara or other sales tax engine to improve tax compliance and reporting efficiency
- Recommend and implement longer term planning tool (e.g., NS, DataRails, etc.) and potential CRM tool for design sales pipeline to feed into planning
- Work with SNA to build out monthly financial reporting package
- Ensure various systems are connected and mapped properly (eg Paychex to NetSuite)
- Recommend efficiency enhancements by utilizing outsourcing models (where possible) or enhanced tech tools (e.g., ServiceNow, UiPath, etc.)
- Ensure legal compliance on all financial functions
- Manage relationships with banks
- Other duties as assigned

### **Required Skills:**

- Super User experience with major ERP's including Oracle products (NetSuite)
- Exceptional written and verbal communication skills required
- Influential and well-versed presentation skills
- People skills at all levels; interpersonal, empathetic, and engagement

### **Qualifications:**

- 7 - 10 years of financial management experience
- Strong finance-based analytical skills
- Prior executive-level leadership experience managing a 5+ person team
- Experience in the Design industry is a plus but not required

### **Education:**

- Bachelor's degree in Business Administration, Accounting, or Finance required
- Master's degree, MBA preferred
- Certified Public Accountant (CPA) designation desired