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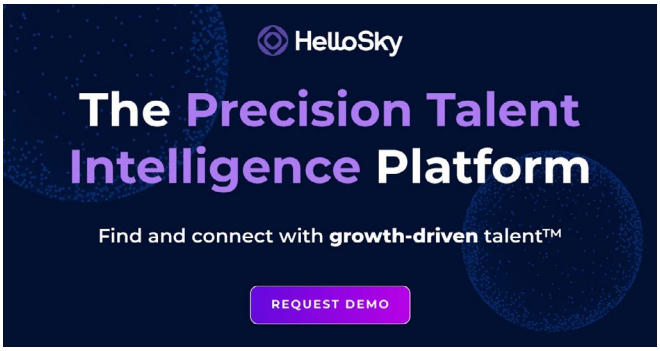

CFO Talent Market Shifts as Leadership Demands Rise



The role of the CFO is undergoing a significant transformation. Once centered largely on accounting, controls, compliance, and reporting, today's CFO is increasingly expected to serve as a strategic partner to the CEO and board—helping shape growth strategy, capital allocation, technology investment, transformation, and enterprise-wide decision-making.

To explore how these changing expectations are reshaping the market for senior finance and financial services leaders, top executive search consultants discussed what clients are demanding, how AI and private equity are influencing leadership profiles, and which skills will matter most over the next 12 to 18 months. Their message was clear: organizations increasingly want executives who can combine deep functional expertise with strategic judgment, technology fluency, and a proven ability to turn transformation into measurable results.

"The role of CFO has clearly pivoted from a compliance, control, reporting focus into more of a strategic business advisor to CEO and business unit leaders," said Richard Dowd, leader of **ZRG's** financial officers practice. "They are being asked to develop strategies that lead to increased revenue and profitability across platforms."

"The advent of AI has mandated we identify leaders that can think creatively about how to apply a still-developing technology in ways that can solve for a multitude of challenges," Mr. Dowd said. "We don't need CFOs that are AI specialists, we need ones that can think ahead and creatively about the art of the possible in terms of how this development can be applied."

Shifting Priorities

Large, progressive financial institutions are increasingly prioritizing CFOs with deep finance experience over traditional backgrounds in accounting and audit, according to Shawn Cole, co-founder of **Cowen Partners Executive Search**. "Asset-liability management and financial forecasting have emerged as two of the most important capabilities in today's financial-services CFO profile," he said. "M&A and post-transaction integration experience are equally critical as more financial institutions pursue acquisitions to accelerate growth in an environment where the rising cost of lending has constrained organic expansion. While a technology-savvy CFO is no longer optional, AI remains largely experimental and aspirational at most firms, with the majority of current enablement coming through AI-enabled technology platforms rather than internally developed capabilities."

Mr. Cole also noted that private equity firms are expecting their portfolio companies to operate leaner than ever. "That is increasing demand for CFOs who can deploy advanced, AI-enabled forecasting software to improve visibility, reduce manual finance work, strengthen scenario planning, and support faster, more disciplined decision-making," he said.

BY THE NUMBERS

The Finance Mandate Widens

57% of finance leaders now play a lead role in shaping enterprise strategy...

...while **64%** plan to prioritize AI, automation, and data-analysis skills.

Source: Deloitte

"We are going to see leaner finance teams, greater consolidation across financial institutions, and a shrinking pool of qualified leadership talent as experienced executives retire," Mr. Cole added. "The strongest CFO candidates will be expected to do more with fewer resources while combining finance, technology, M&A, integration, and operational leadership capabilities that were once distributed across several executives."

"The CFO is increasingly expected to help own value creation and more of that value now rides on whether the company can turn its technology and data investment into results," said Michael Newcomer, CEO of **Riviera Partners**. "The shift is even sharper in financial services, since technology and data sit at the core of the business. The finance leaders who stand out read a technology roadmap as fluently as a P&L and hold the organization to outcomes rather than activity."

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Riviera Partners' forthcoming *Future of Tech Leadership Report*, a survey of close to 1,000 technology leaders across North America and Europe, found only 19 percent of technology organizations have reached advanced execution maturity. Most have an AI strategy, but not the capability to deliver it. Mr. Newcomer's advice to a board hiring finance leadership: screen for someone who treats that gap as their problem too, because increasingly it is.

"AI has raised the bar for what a strong technology leader looks like, and financial services feels it fast, because the cost of getting execution or compliance wrong is high," Mr. Newcomer said. "The change I'd point to is behavioral: the advantage is moving from leaders who set direction and handing it off to leaders who stay close to how the work gets built. Our research bears this out—organizational design is one of the strongest predictors of whether AI reaches real use: over 90 percent of the most mature organizations put product, data, and engineering under a single leader, and none stay siloed."

Value creation now lives in execution, and private-equity recruiting has reorganized around that fact, Mr. Newcomer explained. "PE firms now want leaders who can turn that into margin inside a hold period, not leaders who only articulate a vision," he said. "Our research reveals PE-backed organizations balancing execution speed with operational discipline, between the experimentation of early-stage venture and the heavier governance of public companies. The top action investors told us what they're pushing for is greater investment in execution-focused talent. I tell clients it's no longer enough to have led a transformation on paper. You want evidence a leader has taken initiatives into real operational use, built the team beneath them, and can defend the plan under board scrutiny."

"First, search keeps moving from strategy to execution," Mr. Newcomer noted. "The scarce hire is no longer the person with the best AI story; it's the one who can ship it, with the technical team underneath to build and scale. Most organizations still have an AI strategy without the capability to execute it consistently—closing that gap is now the hiring priority."

"Second, org charts will continue consolidating," Mr. Newcomer continued. "The market hasn't settled on where AI leadership belongs—the standalone chief AI officer has held at roughly one in five organizations—and the more consistent pattern is convergence: product, data, and engineering under a single accountable leader. Third, leadership is getting more flexible. Many senior technology leaders are open to fractional or advisory work. What ties all three together: leaders are judged on outcomes, not activity. For sectors under heavy regulatory scrutiny, financial services included, the firms that get this right will treat that discipline as an advantage and build risk and compliance into execution from the start."

The financial services CFO of today differs greatly from the past, according to Jeanne Branthover, managing partner, global financial services/fintech practice at **DHR Global**. "The CFO role has evolved from the organization's principal financial steward into a strategic partner to the CEO, board, and business leaders," she said. "Technical finance expertise remains essential, *(cont'd. to page 3)*

IN THE NEWS

SPMB Expands Financial Officer and Private Equity Practices



SPMB Executive Search has appointed Christy Mihos as a partner in the firm's financial officer and PE practices. "Christy is one of the most accomplished CFO search practitioners in the market, and we are thrilled to welcome him to SPMB," said Dave Mullarkey, managing partner at SPMB. "His track record of advising PE firms and technology companies on the most consequential financial leadership hires is remarkable. But what sets Christy apart—and what makes him such a natural fit for this firm—is how he operates: with deep client commitment, genuine long-term relationships, and an intensity for outcomes that reflects exactly who we are at SPMB."

Mr. Mihos specializes in recruiting chief financial officers and senior finance leaders for private equity, growth equity, and venture-backed technology companies. A long-time trusted advisor to investors and management teams alike, he brings deep fluency in what private equity sponsors demand from their portfolio finance leaders—and the judgment and network to find them, SPMB noted. Mr. Mihos is a trusted partner to PE and growth equity investors, including Silver Lake, Insight Partners, Five Elms Capital, and Blue Star Innovation. Christy helps firms build and scale finance organizations across their portfolios.

but the mandate is now much broader. CFOs are expected to help shape enterprise strategy, allocate capital, improve operating performance, guide technology investments, and anticipate regulatory and market risks."

"Today's finance leaders most often have the following experience: strong command of capital, liquidity, regulatory requirements and risk; commercial judgment and the ability to influence business strategy; experience leading transformation, including modernizing systems and finance functions; the ability to translate data into clear, actionable decisions; credibility with boards, investors, regulators, and rating agencies; and a leadership style that attracts talent and creates accountability across the organization," Ms. Branthover explained. "The best CFOs can move comfortably between strategy and execution, understand the economics of the business, and challenge the organization constructively. Digital and a strong understanding of AI have also become important—not because CFOs need to be technologists, but because they must evaluate investments, establish appropriate controls, and ensure that technology produces measurable value."

Ms. Branthover also shared how the approach to executive recruiting in private equity-backed environments has evolved. "Executive recruiting in private equity has become more proactive, more data-driven, and much more closely connected to the investment thesis," she said. "Sponsors increasingly assess leadership during diligence or immediately following an acquisition, rather than waiting for an obvious performance gap to emerge. The central question is no longer simply whether an executive can perform the role—it is whether that person can execute the specific value-creation plan within the sponsor's timeframe."

Ms. Branthover added that "successful PE executives tend to share several qualities: a strong sense of urgency without sacrificing sound judgment; comfort operating with limited resources and incomplete information; a highly analytical and metrics-oriented approach; the ability to move between strategic planning and hands-on execution; experience building scalable processes and management teams; transparency and confidence when working with an active board and sponsor; and resilience, low ego, and the willingness to make difficult decisions quickly."

Looking ahead, Ms. Branthover expects the market to remain active, but highly selective. "Several trends will define the market: AI leadership will become more important as firms expect leaders across finance, risk, operations, and technology to demonstrate AI fluency and ownership," she said. "Risk, compliance, and technology will become more interconnected. Transformation experience will command a premium. The bar for CFOs will continue to rise. Succession planning will move higher on the board agenda. Leadership assessment will become more evidence-based. And selective flexibility will remain part of the talent equation. Overall, financial services organizations will be looking for leaders who can manage two competing demands at once: accelerate change and protect the institution. The executives who can innovate responsibly, build high-performing teams, and translate transformation into measurable business results will be the most sought after."

Evolving Role

The role of the CFO has evolved significantly in recent years, according to Todd Shiner, VP and national practice leader at **BrainWorks**. "Today's CFOs are increasingly responsible for functions beyond traditional finance, including operations, legal, human resources, real estate, and administration," he said. "As a result, firms are prioritizing CFOs who combine strong financial and technical expertise with strategic leadership, commercial acumen, operational breadth, and the ability to lead through change. Identifying the right CFO requires a clear understanding of the organization's broader leadership needs and a disciplined approach to weighing the skills, experience, and attributes most critical to success."

"AI and technology are rapidly reshaping the role of finance," Mr. Shiner added. "CFOs are increasingly being asked to identify where AI can be effectively adopted to automate repeatable tasks, improve efficiency, and enhance decision-making. However, the value of AI extends well beyond operational efficiencies and basic financial modeling. As more processes become automated, the ability to interpret financial information, provide strategic insight, and translate data into business decisions becomes increasingly important. Companies are looking for finance leaders who are not only technically strong, but also technologically curious, and capable of leading organizations through the adoption and effective use of emerging technologies."

Mr. Shiner also explained that private equity firms have become increasingly sophisticated in how they assess and measure technical expertise, leadership attributes, soft skills, and alignment with an organization's strategic objectives. "As a result, executive recruiting in PE-backed environments has become more rigorous, data-driven, and focused on both immediate performance and long-term value creation," he said. "Executive search partners *(cont'd. to page 4)*

must stay at pace with, and ideally exceed, the assessment capabilities of their clients. Properly vetting and confidently presenting top talent requires discipline, creativity, intelligence, finesse, patience, and grit. Most importantly, understanding a PE sponsor's leadership expectations and value-creation objectives in depth allows us to develop effective scorecards and assessment criteria that support thoughtful hiring decisions."

Over the next 12 to 18 months, Mr. Shiner thinks that AI will continue to reshape virtually every stage of the executive search process. "Firms are already using AI to develop position descriptions, conduct research, identify and source talent, support initial outreach, and enhance candidate assessment and scorecarding," he explained. "AI-powered note-taking and conversation analysis will also become increasingly valuable, allowing search professionals to capture and interpret not only what candidates and clients say, but how they communicate and what is emphasized. The firms that learn to effectively integrate AI into their processes will be able to operate with greater speed, consistency, and scale. Ultimately, AI will enhance the search process, but judgment, relationship management, and the ability to assess leadership talent will remain critical differentiators."

Strategic Partner to the CEO and Board

The CFO role has expanded beyond functional expertise to a role that serves as a trusted strategic partner to the CEO and board, according to Michael Henry, managing partner at **Massey Henry**. "In the age of AI and transformation, the CFO's perspective is a key factor in helping drive enterprise strategy, capital allocation, and technology investment," he said. "Through our firm's CFO practice, we are seeing an emphasis on finance leaders who are able to help prioritize transformation, AI, and strategic productivity objectives. From a recruitment perspective, this has resulted in increased demand for leaders with commercial acumen, strategic thinking, communication skills, and the ability to lead through change. While technical finance expertise remains important, the ability to translate financial insight into business strategy is what distinguishes leading CFO candidates."

"With the advent of AI, organizations need executives who have a nuanced understanding of strategic transformation at the enterprise level," Mr. Henry continued. "The most sought-after candidates are the leaders who can connect technology to business outcomes, determine where automation creates genuine value, and manage the accompanying governance, risk, cybersecurity, and workforce implications."

Mr. Henry also said that executive recruitment in PE-backed businesses has become increasingly tied to value creation. "Leadership teams are expected to deliver measurable results within compressed timelines rather than simply oversee a stable business," he noted. "That places a premium on executives who are highly execution-oriented, commercially-minded, and comfortable operating with pace and change. Experience scaling businesses, improving margins, integrating acquisitions, or preparing organizations for exit can be particularly valuable."

Massey Henry's proprietary 2026 survey of executives in the financial services sector was clear:

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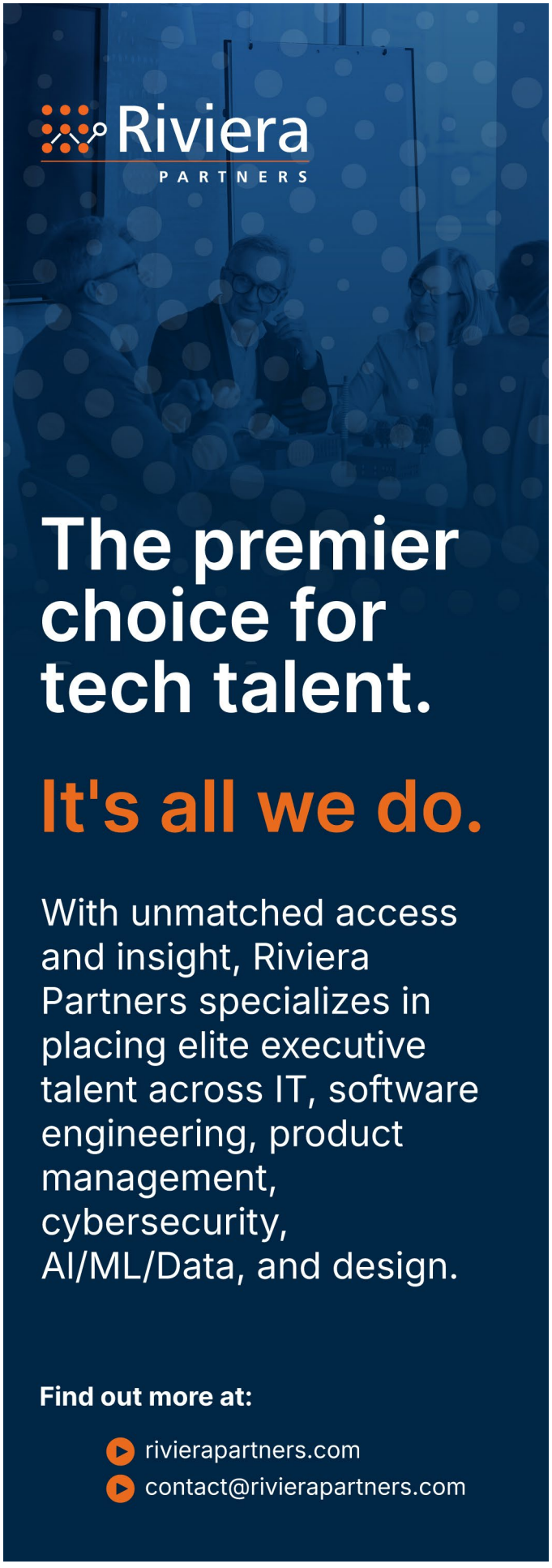

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Riviera Partners — Michael Newcomer, CEO
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Spencer Stuart — Kristin Wait, Consultant
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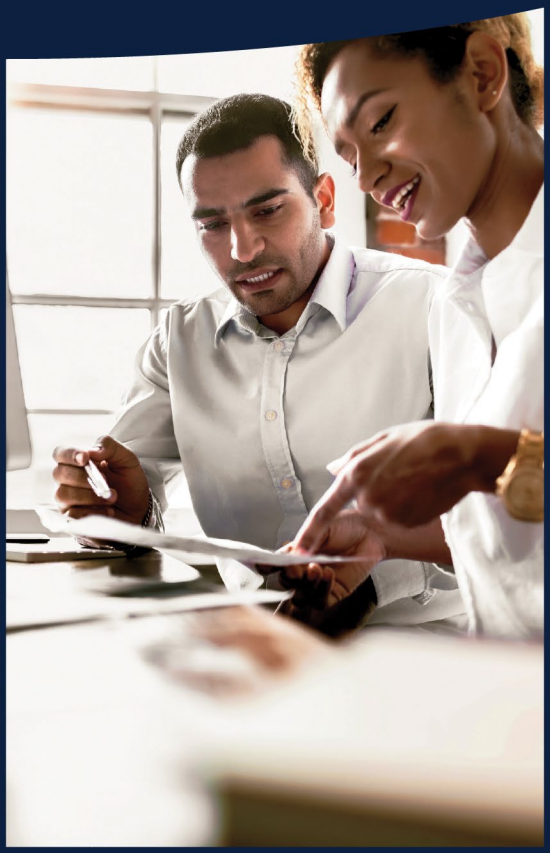

strategic decision-making under uncertainty continues to be the most critical leadership capability, followed by transformation leadership focused on productivity, operating model redesign, and change execution. "Competition for executives with specialized expertise—particularly in AI, data, digital platforms, and cybersecurity—will continue to intensify as organizations balance workforce expectations, compensation pressures, regulatory considerations, and high-performance culture requirements," Mr. Henry said. "At the same time, succession planning and leadership adaptability will become critical as organizations assess whether their existing leadership teams have the capabilities required for the next phase of transformation."

Andy Boccio, co-founder and CEO of **Landing Point**, shared that the baseline requirement used to be fairly straightforward: keep the fund accounting clean, maintain strong controls, and get the tax work done on time. "Those things are still important, but they are now expected," he said. "GPs increasingly want a CFO who can also serve as a strategic partner and contribute to LP relations, capital allocation, and the overall direction of the fund. When we recruit senior finance leaders, technical accounting expertise is generally assumed. The candidates who separate themselves are the ones who can communicate effectively with LPs, provide real transparency into fund performance, and work well with the investment team and portfolio company leadership. As a firm grows, the CFO also needs to build the right team, delegate effectively, and create accountability across the finance and operations functions."

"When it comes to AI, there is a big divide based on the size of the firm," Mr. Boccio said. "The largest funds have the budgets and resources to build customized tools. Across the lower-middle and middle market, it is much more uneven. Data protection and token cost are also two real factors that have caused our clients to pause or take a very slow and deliberate approach. The most common wins we see right now are practical, low-hanging fruit wins like connecting the firm's tech stack to a chat product to reduce manual reporting, pull information together faster, and improve how they prepare LP materials."

Recruiting in PE-Backed Environments

Executive recruiting in PE-backed environments has evolved from focusing primarily on deep functional expertise to seeking broader, more dynamic operators, according to Mr. Boccio. "Firms still want executives who are strong in their core discipline, but they increasingly prioritize leaders who can work across finance, operations, accounting, technology, and organizational strategy, often at the accelerated pace of a PE ownership cycle," he said. "The top candidates remain hands-on while maintaining a big-picture mindset. The real unicorn is a leader who can do all of that while developing a practical plan for incorporating AI across the business, without chasing technology simply for technology's sake."

Mr. Boccio also noted that there are two trends that will define financial services executive recruiting over the next 12 to 18 months. "The first is search firms' ability to incorporate AI effectively—not just for light productivity gains, *(cont'd. to page 7)*

but embedding it into day-to-day workflows and using it as a decision-support partner across sourcing, business development, assignment execution, and data maintenance," he explained. "The second trend is what got us here in the first place: relationships. As AI replaces more of the execution-based advantages in recruiting, relationships, judgment, and client experience will become even more valuable. The firms that double down on those areas will be the winners. That relationship advantage will be especially important at the senior-leadership level—leadership will be the difference between companies that execute successfully and those that fall behind."

Evolving Skill Sets

"Prior to and in the immediate aftermath of the financial crisis, financial services organizations prioritized CFOs with strong control-focused skill sets to navigate the regulatory environment and ensure the stability of the organization during uncertain economic times," said Stuart Higson, partner at **Leathwaite**. "Technical capability was highly valued, meaning the path to CFO regularly originated from the accounting profession. The shift over the last decade has been toward a more strategically minded CFO who can drive growth and long-term value creation. In many cases, CFOs are now considered the de facto deputy CEO, helping to shape business strategy while leading firm-wide initiatives related to technology investment, data, and, more recently, AI. In smaller and mid-sized organizations, they may also assume responsibility for a broader remit spanning HR, technology, operations, and risk management. Expectations around the public-facing aspects of the role have also increased significantly, with CFOs expected to proactively manage investor and client relationships and act as a visible representative of the organization in the media."

"This evolution has fundamentally changed the path to the CFO role," Mr. Higson explained. "Being a CPA is no longer a prerequisite. Today's CFOs are expected to draw on a broader range of skills and experiences. Previous CFO experience remains valuable, and often important, but is increasingly expected alongside broader operational or business leadership experience. Internal candidates now emerge from both P&L and finance roles, with strategic finance experience such as FP&A, treasury, corporate strategy, and investor relations particularly valued."

"Financial services organizations are entering a new phase of AI adoption," said Andy Demesier, director at Leathwaite. "The conversation has shifted from experimentation to execution, and increasingly from models to data. The differentiator is no longer access to AI, but an organization's ability to operationalize it responsibly at scale by combining trusted data foundations, modern data architectures, governance, agentic workflows, and deep business expertise. That evolution requires a different kind of executive. Organizations are increasingly looking for hybrid leaders who combine business acumen with technology fluency and can align strategy, engineering, operations, talent, and risk around a common vision. They need leaders who understand how AI can improve client experience, strengthen risk management, drive operational efficiency, and create

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commercial value while building the trusted data foundations and governance required to scale AI across the enterprise."

The hardest part of executive search today isn't finding executives — it's figuring out what problem the business is actually trying to solve, Tim Dunn, partner at Leathwaite, explained. "That's where PE-backed recruiting has changed the most," he said. "The best investors don't start with a job description. They start with the value they want to create over the next five years. Once they understand that, they can work backward to define the leadership they need. The executive profile should be the result of the strategy and not the starting point."

Mr. Dunn noted that too many searches begin with: who do we want? The better question is: what are we trying to accomplish? "It may sound like a subtle shift, but it's fundamentally changed the role of executive search," he said. "Today, clients expect us to do more than introduce candidates. They want us to challenge assumptions, sharpen the mandate, and help define what success really looks like before the search even begins. As executive search continues to evolve, the firms that win won't be the ones with the biggest databases or the longest list of contacts. They'll be the firms that ask the best questions. The best searches don't end with an accepted offer. They begin with a shared understanding of the problem everyone is trying to solve."

Looking Ahead

"Over the next 12 to 18 months, executive hiring in financial services will become increasingly polarized between enterprise leaders capable of leading through complexity and specialist leaders with deep AI, technology and transformation expertise," said Tom Pemberton, co-CEO of Leathwaite. "Firstly, organizations are looking for well-rounded enterprise leaders with a proven track record of driving change. For many years, financial services firms have been focused on building benches of technical subject matter expertise. As the geopolitical and macroeconomic backdrop remains unpredictable, and technology innovation and AI continue to accelerate, organizations are now focused on ensuring they have the right leaders who are adept at driving broad portfolios of responsibility, with the intellectual agility and flexibility to lead successfully across a wide remit."

"Given the increasing complexity of enterprise leadership, financial services firms have become more risk-conscious," said Mr. Pemberton. "Many are appointing proven executives with established track records, while others are investing earlier in succession by hiring high-potential deputies who can learn the organization before assuming enterprise-wide responsibility. Firms are therefore often hiring at a more senior level, focusing on proven leadership experience and a demonstrated track record of success across multiple organizations, functions and, where relevant, geographies."

"Secondly, where organizations are focused on subject matter expertise, demand remains strongest in the AI and technology domain, as well as COO and transformation functions," he added. "These hires who are largely focused on ensuring the right technical expertise around technology, AI, process and change management can work in partnership with

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IN THE NEWS

Crist|Kolder Associates Recruits CFO for Allstate

Crist|Kolder Associates has recruited Christian Lown as executive vice president and chief financial officer of The Allstate Corporation. "Chris's leadership and capital markets expertise will enable us to continue increasing Property-Liability market share and expand protection provided to customers," said Tom Wilson, president and CEO of The Allstate Corporation.

With more than 25 years of senior leadership experience in finance and capital markets, Mr. Lown has led organizations through growth, transformation, and complex market environments. He joins Allstate from CoStar Group, where he served as CFO and led finance, investor relations, business development and facilities. Mr. Lown previously served as CFO at Freddie Mac and Navient Corporation, following senior finance roles at Morgan Stanley and UBS.

firmwide leadership to modernize operating models and deliver transformation at scale."

"Looking ahead, I believe one of the defining trends in financial services executive recruiting will be the growing disconnect between the enterprise leaders organizations seek and the leadership pipelines the market increasingly produces," said Brandon Biegenzahn, president of **McDermott + Bull**. "Across banking, wealth management, fintech, and specialty finance, organizations continue to seek executives who can think across the enterprise, lead through change, and influence strategy beyond their functional expertise. At the same time, career paths increasingly reward specialization. Leaders are becoming deeper experts in finance, technology, risk, operations, or product management, but they often have fewer opportunities to develop the broad enterprise perspective traditionally associated with senior executive roles."

As a result, Mr. Biegenzahn expects organizations to place increasing emphasis on leadership capacity rather than prior title alone. "Boards and CEOs will continue to value experienced lateral talent whenever it is available," he explained. "However, the supply of executives who have previously held the same role remains limited. The most successful organizations will increasingly evaluate a candidate's ability to grow into broader responsibility, considering factors such as strategic thinking, cross-functional leadership, executive presence, and the ability to influence across the organization."

"This shift will also place greater importance on intentional leadership development," Mr. Biegenzahn said. "Organizations that expose high-potential leaders to enterprise initiatives, board interaction, M&A integration, transformation efforts, and cross-functional assignments will be better positioned to build their next generation of executive leadership from within."

"Ultimately, executive recruiting will increasingly focus on identifying leaders with the capacity to grow beyond the role they hold today and lead at the enterprise level tomorrow," Mr. Biegenzahn added. "As the supply of experienced lateral talent continues to tighten, organizations will increasingly have to evaluate leadership capacity alongside traditional experience."

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The Financial Services industry is ever changing, consolidating, and undergoing a dramatic shift in leadership talent needs. Our Financial Services executive search team anticipates tomorrow's leadership challenges today, and our deep industry insight enables us to introduce "next-level" leaders to our clients.

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SPOTLIGHT

Why Judgment Will Define the Next Era of Financial Services Leadership



Calibre One *is a leading boutique executive search firm with more than 25 years' experience building leadership teams for technology companies and innovation-led organizations across financial services, healthcare & life sciences, consumer, sports & entertainment, and industrials & infrastructure. Founded in 1999, the firm operates from London, San Francisco, and New York, combining global reach, deep sector expertise, and a Partner-led approach.*

David Schumer is managing partner and head of the financial services practice at Calibre One. With a track record of successfully recruiting C-level executives for industry-transforming FinTechs, as well as front office professionals to the buyside, he advises his clients on team structures, strategy, and talent needs. Mr. Schumer recently sat down with ***Hunt Scanlon Media*** *to discuss the evolving role of the CFO, how AI is reshaping leadership needs, the changing demands of private equity-backed environments, and the trends set to define financial services executive recruiting in the months ahead.*

David, how has the role of the CFO evolved in financial services organizations, and what qualities are firms prioritizing when recruiting for senior finance leadership today?

The CFO we searched for five years ago and the CFO clients ask for today are almost different jobs sharing the same title. The old archetype was defined by command of the reporting pack, the relationship with the debt provider, and steadiness under monthly pressure. Big Four training was near-mandatory. The financial model was everything and speed of close was the metric. That profile is not extinct, but it is increasingly beside the point. It is table stakes. Two forces did the rewiring. The end of cheap debt removed financial engineering as the default value-creation lever, which pushed the CFO from steward to architect. Operational alpha became the mandate. At the same time, finance turned out to be one of the most successful proving grounds for AI utilization, because it runs on structured data and repeatable workflows. A CFO who cannot fluently direct AI across forecasting, variance analysis, and working capital is already operating at a structural disadvantage.

Anything else?

Firms are actually prioritizing business leadership over finance leadership. We look for 'strategic CFOs' who are trusted partners to each business unit and advisor across every C-suite function. The strategic CFO opines on pricing, weighs in on fund structures, understands business drivers for client service, and so much more. From accurate reporting, to board-level credibility, to driving M&A, to owning AI deployment, good CFOs are driving operations enhancements and helping to align priorities across the business. There is also a psychological dimension that gets underweighted. Finance leaders naturally skew toward caution and stability. Sponsors are driven by growth and transformation. The candidates who succeed can operate at deal speed while holding the governance rigor investors require. Credentials still matter—the accounting qualification gets you into the room. What keeps you in the seat is commercial instinct, transformation experience, and the judgment to know which levers to pull and when.

"Private equity has become the most demanding buyer of executive talent in the market."

How are AI and technology reshaping talent needs in financial services, and what does that mean for the kind of leaders organizations are looking for?

There is a quiet assumption forming right now: that the winners of this era will be the firms and people who use AI the most. It sounds right. It is mostly wrong. The biggest risk of AI is not that it replaces original thinking. It is that it rewards average thinking. When execution becomes a commodity, judgment becomes the premium. AI is the tool, but leaders of organizational change who base decisions on solid judgment win the day. The market is already pricing a premium for leaders who can interrogate, govern, and communicate AI-driven decisions—not simply consume the output. The value has moved to the person who knows when to agree with the machine and when to override it. Leaders of financial services organizations should be looking for change managers, not the heaviest AI users. They are the ones with the creativity, critical thinking, and authenticity to shape the questions worth asking.

How has the approach to executive recruiting in private equity-backed environments evolved, and what unique leadership qualities do PE-backed firms prioritize when building out their management teams?

Private equity has become the most demanding buyer of executive talent in the market, and the search itself has had to evolve to match. Longer hold periods and constrained exit activity have made leadership change a performance lever rather than a disruption to be avoided. Sponsors now replace portfolio executives mid-hold at historically high rates. The practical implication is that the window to deploy the right person has narrowed, and the cost of getting it wrong has risen sharply. The qualities that matter have shifted from stewardship to transformation. Commercial acumen over technical purity. The instinct to translate an investment thesis into operational initiatives across pricing, margin, cost, and scalability. Relationship credibility with a board, not just a reporting line to a CEO. And the resilience to operate at deal speed under real pressure without losing the governance rigor investors require. Business leadership first, functional leadership second. The firms that win the best people are the ones that move quickly, structure compensation and equity thoughtfully, and run a process that reaches beyond the obvious networks. Speed and rigor are not in tension here. They are both required.

The Role of the CFO in PE-Backed Businesses

The role of the CFO in private equity-backed businesses has shifted materially in recent years. Historically a function for financial stewardship, the CFO role is now defined by operational accountability, value creation, and the ability to translate investment strategy into outcomes. A recent report from U.K.-based executive search firm **The Barton Partnership (TBP)** examined how that shift is playing out in practice, drawing on a survey of 258 CFOs across Europe, North America, and Asia-Pacific.

It explored how the mandate is evolving across the investment lifecycle, how CFOs engage with sponsors, how finance functions are structured and resourced, and where CFOs are most exposed to risk as expectations rise. The findings point to a role that is broader in scope, more integrated into business decision-making and more directly accountable for delivery. CFOs are no longer operating alongside the value creation agenda—they are increasingly responsible for enabling and evidencing it.

"In many businesses, the role is converging with COO responsibilities, particularly at smaller scale. Data ownership is an equally defining shift, with CFOs now expected to lead the business's information architecture rather than simply report on it."

The Barton Partnership found a consistent pattern emerges: effectiveness is shaped as much by the conditions of the mandate as by the capability of the individual. "Where expectations are clearly defined, the function is sufficiently resourced and alignment between sponsors and management teams is maintained, CFOs are able to mobilize quickly and drive impact," the report said. "In these environments, the role operates as intended, enabling value creation, improving decision-making, and supporting delivery of the investment plan. Where these conditions are absent, time is diverted into aligning stakeholders and rebuilding foundations, rather than advancing the agenda."

Sixty-seven percent of CFOs told The Barton Partnership that the scope of their role has changed materially in recent years. "That view holds across all experience levels, indicating a structural shift in sponsor expectations rather than a learning curve," the study explained. "In many businesses, the role is converging with COO responsibilities, particularly at smaller scale. Data ownership is an equally defining shift, with CFOs now expected to lead the business's information architecture rather than simply report on it."

Areas of Focus Today

The Barton Partnership also found that value creation initiatives are now the primary area of day-to-day focus (67 percent), closely followed by cash flow and liquidity (57 percent) and financial reporting and controls (54 percent). M&A, integrations, and exit activity are also high on the

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agenda at 53 percent. Financial reporting and controls remain fundamental, but no longer define the role. CFOs' priorities vary by company size. In businesses with a turnover below $100 million, value creation and cash management dominate (61 percent and 60 percent). In the $100 million to $250 million band, value creation peaks at 78 percent. In $250 million to $500 million businesses, value creation leads at 70 percent with cash close behind. At $500 million+, value creation remains top at 77 percent, alongside an elevated cash focus.

In addition, 87 percent of CFOs describe themselves as strong contributors to or leaders of the Value Creation Plan, with 27 percent leading it outright. Only 13 percent report limited or no involvement. The pattern is largely consistent across company sizes. VCP engagement is a baseline expectation regardless of scale. In large businesses with a turnover of $500 million+, CFOs are generally leaders (36 percent) or strong contributors (55 percent). In smaller businesses, they are more often contributors, though some still play a leading role.

Alignment with Investors

Misalignment is most pronounced at $100 million to $250 million, where 26 percent report frequent or significant misalignment. This may reflect the governance and reporting demands at that scale, combined with sponsors who retain high expectations without always providing adequate support, according to The Barton Partnership report.

When the firm asked CFOs what they needed most from PE sponsors, clear and realistic performance expectations top the list by a wide margin (79 percent). Strong partnership between the sponsor and the CEO and board is the second most valued condition (76 percent), reflecting how much the CFO's effectiveness depends on the quality of the relationships at the top of the business.

"Where relationships are strained or unclear, the CFO is often left managing the gaps," the report noted. "As the CFO takes an increasingly prominent role in value creation planning and execution, challenging sponsor dynamics are an important factor at play. CFOs must report to and manage PE investors as the role evolves."

Faster Growth

PE-backed businesses frequently grow faster than their finance infrastructure. The Barton Partnership found that 59 percent of respondents describe the function they inherited when taking on the role as weak and requiring a rebuild. A further 28 percent say it was adequate but under-resourced. Only 13 percent inherited something strong and scalable, concentrated in larger businesses.

Even in larger portfolio companies, the picture rarely starts from a position of strength. Only 19 percent of CFOs in the highest turnover businesses say they had a strong finance function when they took up the role. The CFO is expected to address that capability gap while driving the broader value creation agenda.

The Barton Partnership helps businesses grow and transform by providing flexible access to our talent network through executive search, interim & independent consulting, and advisory & consulting solutions.

Top Searches Making News...

Resource Management Group Assists Biomerics with CFO Search



Resource Management Group (RMG), an executive search firm specializing in CFO placements, has assisted in the recruitment of Kristin Mason as CFO of Biomerics, a vertically integrated contract manufacturer for the interventional medical device market in Salt Lake City, UT. “Kristin brings a unique combination of strategic financial leadership, operational rigor, and growth experience,” said Arun Mohan, CEO. “Throughout her career, she has helped organizations scale, strengthen financial performance, and navigate transformational growth initiatives, including mergers and acquisitions. As Biomerics continues to expand our capabilities, global footprint, and market leadership, Kristin is the right leader to help guide our next chapter.”

Occam Global Recruits CFO for eGenesis



New York City-based **Occam Global** has placed Glenn Vraniak as CFO of eGenesis, a biotechnology company developing human-compatible engineered organs for transplantation. “eGenesis is entering a pivotal stage in our evolution as we prepare to advance our programs through clinical development and lay the foundation for future commercialization,” said Mike Curtis, CEO of eGenesis. “Glenn brings deep expertise and proven leadership across finance, capital formation, and business development and we are thrilled to have him join the team to help drive the next phase of growth for the company.” Mr. Vraniak brings more than two decades of executive leadership experience across biotechnology, medical technology, and specialty pharmaceuticals.

Lochlin Partners Recruits CFO for the Virginia Hospital & Healthcare Association



Lochlin Partners has recruited Janelle Padgett as VP and CFO of the Virginia Hospital & Healthcare Association in Glen Allen, VA. Ms. Padgett has more than 25 years of progressive executive leadership experience across complex healthcare systems, including multiple CFO, controller, and senior finance leadership roles within both for-profit and non-profit healthcare organizations. Most recently, she served as chief financial officer of Fauquier Health. Prior to that, Ms. Padgett was assistant vice president of financial reporting and budget operations at MedStar Georgetown University Hospital and senior controller at The George Washington University Hospital. The Virginia Hospital & Healthcare Association has 26 member health systems, representing 117 community, psychiatric, rehabilitation, and specialty hospitals throughout Virginia.



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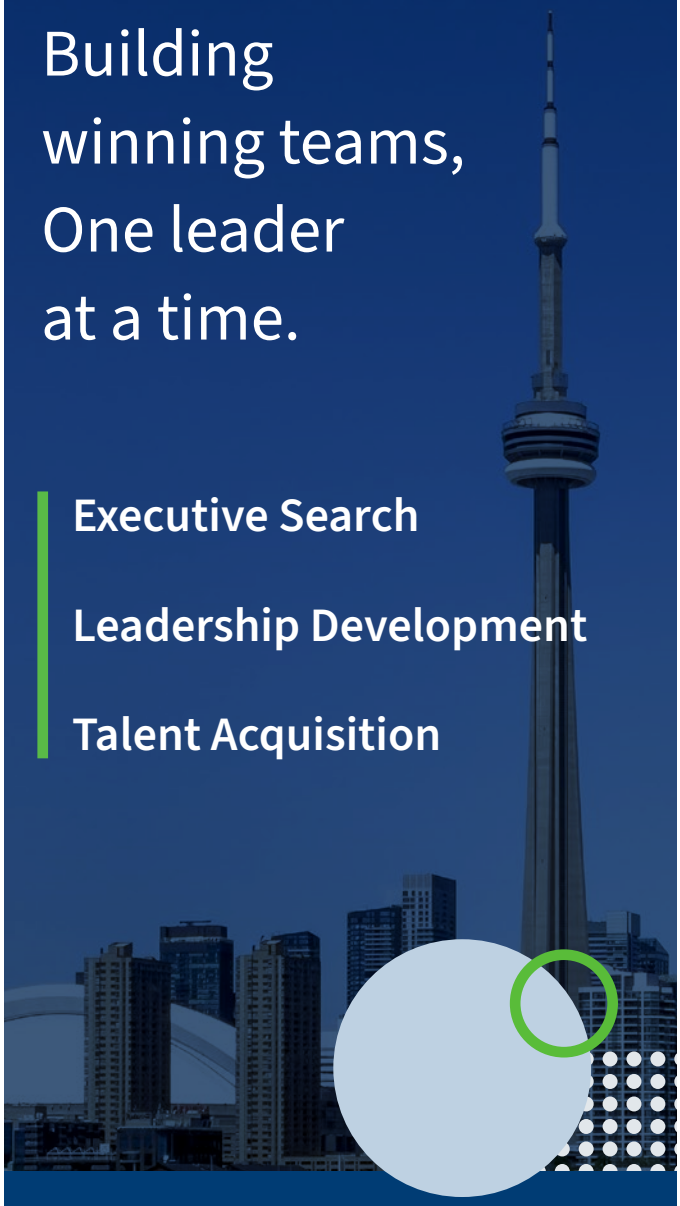

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Marovi Assists Congruex with CFO Search



Working in partnership with **Marovi**, Congruex, a provider of digital infrastructure engineering and construction services, appointed Jim Stanley as CFO. He reports to Congruex's co-founder, president, and CEO, Kevin O'Hara. The appointment comes amid strong and sustained growth at Congruex as it plans to continue to capitalize on macro tailwinds, including AI and data center expansion, continued fiber to the home deployments, and civil solutions for mission-critical infrastructure delivery. "Congruex is operating at the core of the digital infrastructure revolution in the United States," said Mr. O'Hara. "Jim is an ideal partner to lead our finance organization and drive continued success, with a commitment to disciplined execution and a track record of achieving growth that will help shape our next phase of value creation for all stakeholders."

Academic Career & Executive Search Retained by Briar Cliff University to Find New CFO



Academic Career & Executive Search (ACES) has been selected by Briar Cliff University to lead in its search for a vice president of finance and chief financial officer. Jennifer Muller, managing partner, is leading the assignment. Briar Cliff University seeks a strategic and entrepreneurial financial leader. Reporting directly to the president and serving as a member of the cabinet, the CFO will play a central role in advancing the University's continued recovery and long-term sustainability. Briar Cliff has made significant progress through a comprehensive multi-year recovery strategy focused on enrollment growth, revenue enhancement, and long-term financial sustainability. The CFO will provide strategic financial leadership to the president, cabinet, and board while overseeing all financial operations of the University.

Bell Oaks Executive Search Seeking Chief Finance and Administrative Officer for the Winthrop Rockefeller Foundation



Atlanta-based **Bell Oaks Executive Search** is currently seeking a chief finance and administrative officer (CFAO) for the Winthrop Rockefeller Foundation (WRF). The assignment is being led by partner Cynthia J. Moreland and senior search consultant Abi Gamino. The CFAO will serve as a strategic partner to the CEO and as a key member of the executive leadership team, overseeing the foundation's financial integrity, operations, grants administration, human resources, and compliance functions. The ideal candidate will bring 15-plus years of senior finance and operations experience, ideally within a private foundation or mission-driven organization.