



# Case Study: Supporting a Smooth CFO Transition in the Education Sector

## The Challenge

A new CFO was stepping into the role at a time when the school faced several high-stakes financial and operational priorities, including:

- + Major capital projects over the summer
- + Year-end close and financial statement audit
- + Ongoing board and committee meetings
- + Coordination of multiple service providers

Without additional support, the risk of missed deadlines, budget overruns, and governance gaps was high.

## Our Approach

Smith + Howard's team structured the engagement around two core priorities:

### Operational Continuity

- + Oversight of capital projects, audit prep, and financial close
- + Weekly meetings + continuous documentation for transparency

### Leadership Transition

- + Guided a seamless transfer of responsibilities to the incoming CFO
- + Ensured stability in governance and reporting during the handover

## Results Delivered

- + Capital projects completed **on time + on budget**
- + Audit completed **without delay**
- + Financial close delivered **ahead of schedule** with strong operating margin
- + All board and committee meetings **executed successfully**
- + Incoming CFO transitioned into a **stable, well-prepared environment**

## The Takeaway

By stepping in as a **Fractional CFO**, Smith + Howard enabled the school to protect financial stability, deliver on critical projects, and ensure its new leader inherited a strong foundation at the start of the academic year.

**Education**  
INDUSTRY

**Fractional**  
**CFO**  
ENGAGEMENT



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