

A confidential room where CFOs *think out loud*, pressure-test decisions, and leave with clearer direction.

The CFO seat is often isolating. *CFO Circle is the gap-filler.*

CFO Circle brings together accomplished Chief Financial Officers in a confidential, professionally facilitated setting to exchange ideas, solve real challenges, and strengthen both business and leadership impact — combining peer collaboration, guided frameworks, and real-world issue processing.

THE PAINS WE ADDRESS

Isolation at the top

"It's lonely in this seat. I don't have anyone I can talk to about this — I wish I had other CFOs to run things by."

Stuck in functional finance

"I want to be more strategic — out of the weeds, with influence beyond finance."

Growth outpacing the system

"We've outgrown our systems. KPIs and forecasting are weak, and decisions feel reactive."

WHAT MEMBERS TAKE HOME

Sharper strategic decisions

Test ideas against seasoned peers before they reach the boardroom — and avoid costly missteps.

A trusted CFO-only network

A vetted, curated room where trust is the product. What's said in the room stays in the room.

From tactical to transformational

Move beyond functional finance into strategic enterprise leadership.

Clearer direction, faster

Leave each meeting with pressure-tested decisions and a stronger sense of what to do next.

The 8 Key Drivers of *CFO Success*

Every session is structured around one framework. Members benchmark themselves across eight drivers of CFO performance and build a personal action plan against them — the throughline that turns monthly discussion into measurable progress.

- | | |
|------------------------------------|-----------------------------------|
| 1 Strategic Financial Alignment | 2 Drive Growth & Profitability |
| 3 Balance Risk & Innovation | 4 Foster a Data-Driven Culture |
| 5 Manage Stakeholder Relationships | 6 Continuous Skills Development |
| 7 Mentor & Team Development | 8 Ensure Long-Term Value Creation |

INSIDE THE CIRCLE

Features & *format*

- | | |
|--|---|
|  Professional facilitation
Structured around the 8 Key Drivers of CFO Success framework. |  Exclusively for CFOs
A confidential, curated community — not a networking group or sales channel. |
|  Real-world issue processing
The Hot Seat method, applied to the challenges you actually carry. |  Disciplined rhythm
Once a month, three focused hours, with breakfast provided in-person. |

WHAT A MEETING LOOKS LIKE

- | | | | |
|--|---|---|---|
| 01 Member Updates
A brief professional and personal update from each CFO, building trust and continuity. | 02 Education & Framework
A focused segment drawn from the 8 Key Drivers — practical and immediately applicable. | 03 Issue Processing
The group works a real challenge one member faces, using the Hot Seat method. | 04 Commitments & Wrap-Up
Actions confirmed before adjournment. Members leave with clarity and accountability. |
|--|---|---|---|

Who's in the room

CFO Circle Los Angeles is built for senior finance leaders with decision-making authority — CFOs of privately-held and PE-backed companies, generally \$20M–\$500M in revenue. Each group is curated across non-competing industries, so every conversation stays open, relevant, and genuinely confidential.

8–15

CFOs per group

Monthly

three-hour sessions

In-person

breakfast provided

Annual

membership commitment

HOW MEMBERSHIP WORKS

Membership is by mutual fit — the room is only as valuable as the people in it, so admission is deliberate.

*Not every CFO is a fit. **That is intentional.** It begins with a brief, confidential conversation to confirm the fit, an invitation to experience a session firsthand, and only then a decision about membership.*

BY INVITATION & CONVERSATION

Schedule a confidential conversation

Dalen Lawrence · Chapter Director, CFO Circle Los Angeles

dalen.lawrence@cfo-circle.com · (213) 435-5734

Book a time → calendly.com/cfo-circle/cfo-circle-fit-chat

YOUR FACILITATOR

Dalen Lawrence



Chapter Director of CFO Circle Los Angeles. An entrepreneur, former CEO, and multiple-time CFO, Dalen has built and guided companies through growth, financing, and multiple exits. He founded and leads the Los Angeles chapter — curating each group for fit and facilitating its monthly sessions — and convenes the room as a peer who has lived the decisions its members carry.