





POSITION TITLE: Chief Financial Officer

REPORTING TO: President, Danny Lowery

LOCATION: Pewaukee, WI

THE COMPANY: Tim O'Brien Homes

Tim O'Brien Homes is a privately held, Wisconsin-based homebuilder known for crafting high-performance, energy-efficient homes that blend thoughtful design with sustainable building practices. With communities across the Milwaukee and Madison areas, the company offers a wide range of single-family homes tailored to meet the needs of modern families. Their homes are built with a focus on livability, durability, and long-term value, incorporating features like energy-saving technologies, smart layouts, and quality materials.

Founded with a commitment to innovation and integrity, Tim O'Brien Homes operates under a mission to "positively impact people's lives." The company emphasizes a customer-first approach, ensuring that each home reflects the lifestyle and values of its owners. Their dedication to green building is evident in their ENERGY STAR® and Focus on Energy certifications, which help homeowners save money while reducing environmental impact. With a strong emphasis on community, craftsmanship, and sustainability, Tim O'Brien Homes is nationally recognized, from earning year-after-year Journal Sentinel Top Workplace Awards to being The First Carbon Neutral certified homes in Wisconsin. With 71 employees and nearing \$140M in revenue, Tim O'Brien Homes continues to set a high standard in residential construction throughout Wisconsin with 225 homes built in 2025.

As the organization continues to grow, the leadership team is searching for a strategic and collaborative CFO to enhance their finance function and help to scale the business to \$200M in the next 5 years. The CFO will be a strong influencer across the organization, combining financial data and exceptional communication skills to foster informed decision making and growth across all areas of the business. The successful candidate will be a curious, creative, and forward-thinking leader who enjoys building and scaling processes and translating numbers into action.

CULTURE:

Tim O'Brien Homes fosters a culture deeply rooted in its core values, which are actively lived out in daily interactions. The organization thrives on collaboration, with department leaders regularly stepping beyond their functional boundaries to support one another. Over the past few years, the company has intentionally dismantled silos and invested in various new systems, creating a unified, agile, and growth-oriented environment. The office atmosphere is energetic and welcoming, marked by a healthy pace and a strong sense of camaraderie. Successful leaders at the organization are confident yet humble, dynamic, and inquisitive team players who are true champions of the organization's core values.

Tim O'Brien Homes' Core Values include:

- Deliver Extraordinary Experiences Through inspired team members and attention to detail.
- Foster a Team Environment Supporting individual talents and shared goals.
- Embrace Social Responsibility Giving back to the community and promoting environmental awareness.
- Nurture a Learning Organization Encouraging innovation and continuous improvement.
- Communicate with Empathy & Understanding Prioritizing emotional intelligence and effective communication.





- Be Solution Experts Proactively solving problems with a consultative approach.
- Create Fun Promoting a positive, balanced, and enthusiastic work environment.

REPORTING RELATIONSHIPS:

This position reports to the President and serves as a key member of the senior leadership team (SLT). The CFO will oversee the accounting and finance, data analytics, compliance, and IT services functions, with a total team of six. The CFO will manage external relationships with banks, outsourced IT, development trade partners, peer groups, and community partners.

SCOPE AND RESPONSIBILITIES:

The CFO will lead the accounting, financial strategy, and administrative activities for the organization. This person will be responsible for strategic financial planning, general accounting, land development economics, risk management, and enterprise-wide problem-solving. The CFO will be instrumental in shaping the company's long-term growth trajectory and ensuring financial discipline across all departments.

6-to-18-month deliverables for this role:

- 1. Gain a deep understanding of the business model, services, and key profit and cost drivers to inform strategic financial decisions.
- 2. Establish strong, collaborative relationships across the leadership team.
- 3. Build a forward-looking financial planning and analysis function that enhances budgeting, forecasting, and operational insight.
- 4. Develop a dynamic cash flow forecasting model that accounts for development-related capital needs and large expenditures, ensuring alignment with the company's capital structure.
- 5. Improve access to and utilization of financial data across departments, making financial insights integral to daily decision-making.
- 6. Support the company's strategic goals—controlled growth, leadership development, and productivity gains by aligning financial processes with system investments and right-sizing overhead through improved documentation and process utilization.

Specific Responsibilities:

Financial Leadership & Strategy

- Develop and maintain a rolling 24-month forecast; evolve toward a 3–5 year strategic financial planning model.
- Lead capital planning, banking relationships, and optimize cash flow management.
- Own and drive the annual budgeting process; support long-term capital and workforce planning.
- Serve as a strategic advisor to the President and ownership group on financial, operational, and investment decisions.
- Represent the company in industry-specific peer groups and financial forums alongside the President and CEO.



Land Development & Operational Finance

- Provide financial oversight for land acquisition, entitlement, and development processes.
- Collaborate with land and construction teams to ensure accurate project cost forecasting and ROI analysis.
- Navigate municipal processes and assess the financial implications of development timelines and regulatory hurdles.
- Ensure robust forecasting for capital needs across single-family and multifamily developments.
- Evaluate land deals and development schedules for financial viability and alignment with strategic goals.

Data, Technology & Analytics

- Lead and mentor the Data & Analytics team (currently 2 professionals).
- Advance the company's data infrastructure, including Power BI dashboards, automation, and predictive analytics.
- Champion Al-driven initiatives to improve operational efficiency and decision-making.
- Promote a "Data Accelerator" mindset across departments to foster a culture of insight-driven action.

Cross-Functional Collaboration & Problem Solving

- Partner with department heads to identify operational inefficiencies, using financial data to uncover areas of improvement.
- Act as a financial translator, helping non-financial leaders understand the impact of their decisions.
- Lead initiatives that improve margin, reduce waste, and align departmental goals with financial outcomes.

Team Leadership & Organizational Development

- Oversee the Controller, AP, closing coordinator, IT, and analytics functions.
- Collaborate with HR (CEO oversight) on compliance, benefits, and culture-building initiatives.
- Build team capability through mentorship, training, and succession planning.

Governance & Risk Management

- Ensure compliance with financial regulations, internal controls, and audit requirements.
- Develop and maintain risk management frameworks, including insurance, legal, and operational risk.

Other Duties as Assigned

• Flexibly support emerging business needs and special projects as directed by the President or CEO.

EXPERIENCE / SKILLS REQUIRED:

- Proven CFO or senior finance leader with a residential construction background.
- Minimum of 10 years in progressive leadership roles.
- Strong understanding of land, entitlement, and project financing.
- Skilled in forecasting, contracts, capital strategy, and development scheduling.
- Experience with non-bank financing sources is highly valued.
- Humble, low-ego, and collaborative mentality.
- Excellent communicator across all levels of the organization and with external partners.
- Proven team leader with a focus on mentoring individuals.
- Strong time management, prioritization, planning and attention to detail.
- Previous experience with ECI Mark Systems a plus.



EDUCATION:

A Bachelor's Degree in Accounting, Finance, or Business Administration is required. MBA or CPA preferred.

COMPENSATION AND RELOCATION:

The company provides a highly competitive compensation and benefit package, including an attractive base salary, an incentive opportunity and employee benefits.

CONTACT INFORMATION:

Anne Gustafson Manager Truity Partners tel +1 (414) 777-5571

Anne.Gustafson@truitypartners.com

Elizabeth Albano Senior Director Truity Partners tel +1 (608) 240-2312

Elizabeth.Albano@truitypartners.com