



CHIEF FINANCIAL OFFICER (CFO) RESPONSIBILITIES

1. Develop and earn approval of an annual operating budget in collaboration with other board members to effectively and efficiently manage the chapter's resources in a way that increases membership value and supports chapter activities.
2. Produce or oversee monthly and annual financial reporting (including related IRS forms) to ensure the chapter complies with all federal and state reporting requirements.
3. Ensure the operating budget is available to members and that an annual internal or external financial review is completed.
4. Provide ATD Chapter Services with the San Diego chapter's most recent financial documents by January 31, 2016 to meet annual chapter affiliation requirements.

THE MOST FUN THING ABOUT THE CFO ROLE?

Helping board members visualize how they want to serve the San Diego community and supporting their plan to achieve their goals.

THE BIGGEST CHALLENGE FOR THE CFO ROLE?

Remembering to have a calculator at **all** times.

2018 GOALS

1. Complete transition process to fully take over financials and budget.
2. Generate more of a cushion as it relates to money.
3. Generate more membership as it relates to budget.

Check out all of the Board Members and learn more about becoming a Board Member yourself at:
tdsandiego.org/about/chapter-leaders-2018 and
tdsandiego.org/members-only/become-a-chapter-leader





SAN DIEGO CHAPTER
Association for
Talent Development



2018 CHIEF FINANCIAL OFFICER
Mario Reina

Mario has worked in finances for over 15 years. Among some of the companies he has worked with are Financial Profiles, Union Bank and Ernst & Young LLC. With E&Y, he was responsible for providing guidance and financial advice to upper management and top executives of several S&P 500 companies such as Colgate, Wyeth, Exxon, Citigroup and many more.

Mario attended college at San Martin University in Lima-Peru, pursuing a degree in Education, later on taking courses in NYC.

Now as an independent advisor, Mario provides financial services to individuals, business owners, and group benefits for companies.

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