

CASE STUDY



Secretariat
INTERNATIONAL

Secretariat International is a specialty consulting firm providing independent advisory services and expert testimony to clients involved in disputes or litigation related to construction delays or damages.

"TechCXO redesigned and rebuilt our accounting systems, reporting processes and packages which created greater credibility for us and reflected the value of our business. Their work on our behalf set us up for a successful sale."



- **Don Harvey** Founder & Managing Director, Secretariat International

CHALLENGE

Rebuild Secretariat International accounting system after major data loss, transition from cash to accrual accounting, introduce consolidated financial reporting process. Prepare for a sale of the business.

INTERVENTION

Engaged TechCXO including a team of three distinct resources acting as the fractional CFO, VP Finance and Controller, respectively.

As a fully outsourced finance / accounting department, TechCXO implemented its best practice processes, methodologies and systems to professionalize Secretariat's finance/accounting department.

TechCXO led all sell side M&A activity from an accounting and finance standpoint.

OUTCOME

Company was acquired by JLL Partners in 2018. Secretariat's management retained a significant stake in the business, fully aligning their interests with JLL.

For more information, contact Jason Scherr, TechCXO Partner at jason.scherr@techcxo.com

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