

AMERICA'S FOREMOST
LEADERSHIP
SPEAKER

SPEAKER INFO KIT

BILL SHENKIN

billshenkin.com

Leadership Techniques That Accelerate Discipline

Bill Shenkin's Signature Programs



AMERICA'S FOREMOST
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ENGAGING ENTERTAINING INTERACTIVE

Discipline-Based Leadership



Rooted in models inspired by the world's most effective training methodologies and Ironman training, this revolutionary program redefines leadership by demonstrating how discipline, structure, and focus can yield extraordinary results in both personal and professional spheres.

Business-Based Leadership



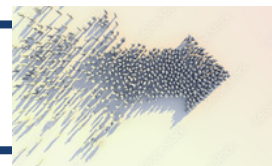
By focusing on key leadership principles and financial literacy, Business Based Leadership equips participants with the tools to make smarter decisions, maximize organizational potential, and lead with clarity and purpose.

Budget-Based Leadership



Built on the foundation of world-class training models, this program redefines traditional budgeting practices by introducing modern, data-driven strategies that empower participants to turn budgets into powerful navigational systems for achieving organizational excellence.

Management-Based Leadership



Rooted in innovative, world-class training methodologies, this immersive program equips participants with cutting-edge strategies to build high-performing teams, optimize workflows, and drive sustainable success.



An amazing presentation! Bill's passion and content were a huge hit! We will be using him again.

Michael Johnson | Company XYZ



PROFESSIONAL BIOGRAPHY

William “Bill” Shenkin is a seasoned financial executive, entrepreneur, and advisor with deep expertise in tax, accounting, family office management, and business strategy.



As the Founder and CEO of CeFO, Inc., Bill leads a premier advisory firm specializing in providing comprehensive financial, tax, and strategic services to high-net-worth families, with client net worths averaging \$75 million and ranging well above \$150 million.

A Certified Public Accountant (CPA) and Certified Information Technology Professional (CITP), Bill brings a unique multidisciplinary approach to navigating complex tax matters, investment transactions, and business challenges. His career spans more than three decades across tax compliance, representation, advanced tax

planning, real estate investment, M&A advisory, and executive financial services.

Throughout his career, Bill has been instrumental in high-profile projects, including preparing the financial projections for the Colorado Rockies and serving as interim CFO during the franchise's establishment in Colorado. He also evaluated the San Diego Padres for acquisition by a client group and has guided numerous complex real estate deals, including multi-hundred-million-dollar funds and sophisticated 1031 exchange transactions.

OTHER INTERESTS:

- Cyclist
- Triathlete
- Competitive Ballroom Dancer
- Composer
- Producer
- Visionary for Fit for Life

Bill Shenkin
Speaker

Leadership Techniques That Accelerate Discipline

Discipline-Based Leadership



This presentation introduces Discipline Based Leadership (DBL) as a strategic framework for improving individual and organizational performance. It emphasizes that structure, consistency, and intentional habits—not raw talent—drive success in today's fast-paced environments. Through practical tools like strategic scheduling, decision-making systems, and communication frameworks, participants learn to build discipline into their leadership style, team culture, and personal routines. The program ends with a focus on aligning personal values with daily actions to foster purpose-driven leadership and sustainable work-life harmony.

Participants will benefit from a dynamic, results-oriented curriculum specifically tailored to address the challenges of

today's fast-paced, high-pressure environments. Whether you're a seasoned executive or a rising star, Discipline-Based Leadership equips you with tools to elevate your performance, leverage discipline as a competitive advantage, and lead with intentionality and purpose.

Business-Based Leadership

This presentation helps leaders evolve from day-to-day operators into strategic business leaders by developing skills across finance, team management, and personal resilience. It emphasizes the mindset shift required to lead effectively, with a focus on financial literacy, strategic delegation, and building high-performing, values-driven teams. Through practical workshops and real-world case studies, participants gain tools to improve financial decision-making, empower their teams, and create sustainable, balanced leadership practices. The program ends with a leadership blueprint to align personal vision, business goals, and well-being for long-term impact.

Participants will explore a dynamic curriculum that balances practical skills with strategic insights, allowing them to tackle financial challenges, improve management techniques, and create a sustainable, thriving business environment. With a steadfast focus on fostering confidence and reducing stress, Business Based Leadership is not just a course—it's a game-changer for professionals aiming to amplify their impact and secure a prosperous future.



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Leadership Techniques That Accelerate Discipline

Budget-Based Leadership



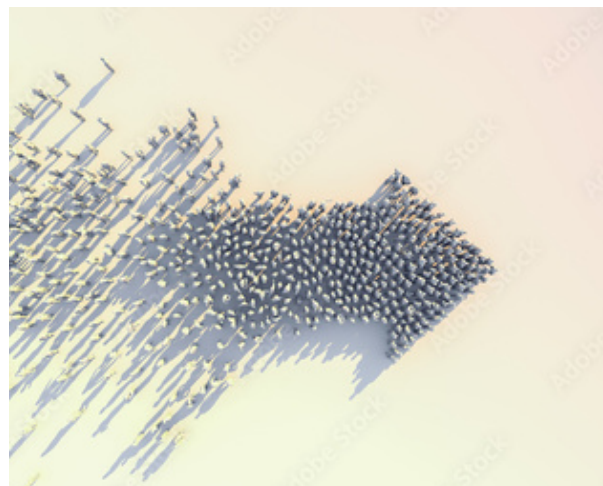
This presentation reframes budgeting as a proactive leadership tool rather than a constraint, helping leaders align financial planning with strategy, innovation, and accountability. It covers goal-driven budgeting, data-informed decision-making, and the use of budgets to fund innovation and manage risk. Through exercises and case studies, participants learn to build strategic financial goals, reallocate resources effectively, and establish strong budget ownership within their teams. The session concludes with a focus on financial stewardship and the role of disciplined budgeting in leaving a lasting leadership legacy.

This program offers a uniquely comprehensive approach, blending actionable financial strategies with leadership

insights to help participants decode the complexities of organizational budgets. Whether you're an entrepreneurial leader looking to scale or a seasoned executive seeking optimization techniques, Budget-Based Leadership delivers the tools and tactics needed to create sustainable financial growth and operational efficiency.

Management-Based Leadership

This presentation is a four-hour leadership workshop designed to equip managers with the mindset and tools to drive high team performance through structured management. It covers foundational principles of management-based leadership, talent alignment, communication systems, and adapting management styles based on individual personalities. Participants engage in interactive activities, diagnostics, and case studies to reinforce key concepts and identify their own leadership blind spots. The program concludes with each participant creating a personalized action plan to shift from reactive firefighting to proactive, performance-driven management.



This program offers participants actionable insights and advanced tools, allowing them to tackle inefficiencies within their teams, strengthen decision-making skills, and lead with confidence. Designed for leaders at all levels, Management-Based Leadership emphasizes a disciplined management style, equipping participants to achieve ambitious goals, streamline operations, and inspire a culture of innovation and growth.



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TESTIMONIALS

Leadership Techniques That Accelerate Discipline



“Bill’s presentation to our CEO group enlightened them on important ways to look at their business to increase efficiency and ensure good accounting practices. Bill shared stories with companies he helped rescue from bad practices.”

“Bill’s presentation to our organization was extremely enlightening to our CEO’s. Not only did he present important business concepts to our leaders, he also discussed the dedication to Ironman triathlons and how this has helped his overall focus and dedication.”

“Bill was treasurer of a major Triathlon nonprofit when I started two years ago and, blessedly, agreed to serve another term. Amid under-resourced finance and foundation teams, Bill’s fiscal oversight, specialized expertise, and broad organizational acumen guided our rapidly growing philanthropic operation through the most challenging waters I’ve encountered. Very much because of him, the Organization is not only fiscally sound but positioned for transformational growth as it launches its first fundraising campaign.”

“Bill served as acting CFO for our family office, providing the family with greatly improved visibility into our financial status through clear, consolidated reporting and proactive oversight. He streamlined complex assets and accounts, enabling more informed decision-making and long-term planning. Additionally, he acted as personal representative for a family member with professionalism, discretion, and unwavering dedication.”

“Bill came on board as acting chief financial officer for our Company, which was experiencing tremendous growth, for which the controller was overwhelmed. Bill assisted in managing growth and ultimately assisted in positioning the company for a purchase by a multi-billion-dollar public company.”

“Bill served as acting CFO and significantly improved our financial oversight for a National Geographic organization. He revamped the Board of Directors reporting package, making it clearer, more actionable, and governance focused. He also restructured our international financial reporting, streamlining processes and enhancing accuracy across jurisdictions.”

“Bill stepped in when a complex oil and gas investment had seemingly gone sideways, and the client was prepared to write off millions. Instead, he took control, restructured the entities involved, and skillfully navigated the legal and financial challenges to recover a substantial portion of the investment. His tenacity, strategic thinking, and deep expertise turned a near-total loss into a major financial recovery.”

“With 38 years of experience in accounting, finance, and tax, Bill brings unmatched depth and perspective to every engagement. His expertise spans complex tax planning, financial strategy, and operational oversight, making him a trusted advisor across a wide range of industries and client needs. His long-standing track record reflects not only technical excellence but also a deep commitment to client success.”

CAREER HIGHLIGHTS

Bill has played key roles in business turnarounds, sales, and acquisitions — from successfully negotiating the bankruptcy exit and litigation settlement for an oil and gas investment, recovering \$6 million for investors, to preparing a pharmacy staffing company for sale to a multibillion-dollar international public buyer. His strategic insights have supported public companies, private businesses, and international ventures, including fitness club acquisitions, refinancings, and developments in the U.S., Singapore, and Taiwan.

Before founding CeFO, Inc. in 2000, Bill served as National Outsourcing Partner at Century Business Services, Inc. (NYSE: CBZ), following the acquisition of Shenkin Kurtz Baker & Co., where he was a founding partner. He began his career at Ernst & Whinney (now EY) and has since built a reputation for providing C-suite and board-level advisory services, assisting companies with CFO-level consulting, bank negotiations, debt and equity financing, restructuring, and board reporting enhancement.

Bill holds both a Master's Degree in Accounting and a Bachelor's Degree in Jazz Piano — and continues to remain active in the music industry as a composer and producer. He is a current or former board member of numerous organizations, including CeFO, Inc., Fit for Life, Inc. (which he founded, focused on psychological research and treatment), Bicycle Colorado, public company boards, and currently serves as Treasurer and Board Member of the USA Triathlon Foundation.

An accomplished athlete and outdoor enthusiast, Bill's personal interests include Ironman competitions, cycling, skiing, hiking, snowshoeing, music, and competitive ballroom dancing. Recognized as one of Denver's "40 Under 40" top business professionals, he combines creativity, discipline, and business acumen to drive meaningful results for clients and organizations alike.





CAREER MILESTONES

Founder & CEO, CeFO, Inc. (2000 – Present)

Founded and leads CeFO, Inc., a premier advisory firm providing comprehensive financial, tax, and business strategy services to high-net-worth families (averaging ~\$75M in net worth). Provides family office management, advanced tax planning, complex investment and real estate structuring, and CFO-level services. Supports numerous businesses with CFO consulting, including bank negotiations, debt/equity financing, restructuring, management reporting, and tax compliance.

Success Highlights:

- Guided real estate funds ranging from \$100M to \$500M+.
- Assisted companies in raising hundreds of millions in debt/equity.
- Structured and supported numerous business sales, acquisitions, and due diligence processes.
- Led integration efforts and expanded national footprint for tax, accounting, and consulting services.
- Managed and streamlined client service delivery across multiple regions.

National Outsourcing Partner, Century Business Services, (NYSE: CBZ) (1997 - 1999)

Oversaw national outsourcing services post-acquisition of Shenkin Kurtz Baker & Co.

Success Highlights:

- Helped scale Century Business Services' national service offerings.

Partner, Shenkin Kurtz Baker & Co. (1989 - 1997)

Partner in charge of the tax department, leading compliance, representation, and planning services for high-net-worth individuals, families, and businesses.

Success Highlights:

- Played a pivotal role in the acquisition by Century Business Services, Inc.
- Built a robust client base with advanced tax strategies and complex transactions.
- Partner in charge of CFO outsourcing and family office.

Ernst & Whinney (now EY) (1986 - 1989)

Early career in public accounting, gaining foundational expertise in tax, finance, and audit services.

KEY CONSULTING ENGAGEMENTS

Colorado Rockies (MLB) → Prepared financial projections, assisted the Governor with investor recruitment, served as interim CFO, and handled tax compliance.



San Diego Padres → Led financial evaluation for client acquisition group.



Oil & Gas Company → Took over management, negotiated litigation settlements, successfully exited bankruptcy, recovering \$6M for investors.

Pharmacy Staffing Company → Led financial preparations and supported the sale to a multibillion-dollar international public buyer.

IMAX Film Company (owned by National Geographic) → Enhanced board reporting and supported bank negotiations.



Fitness Club Industry (U.S., Singapore, Taiwan) → Led \$17M refinance, multiple acquisitions/sales, and international projects.



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RETURN ON INVESTMENT AND REAL EXPERTISE



WHY HIRE BILL AS YOUR NEXT SPEAKER?

Your investment in Bill Shenkin will deliver immediate value, offering your audience actionable strategies for better decision-making and measurable organizational growth. Bill's 38 years of experience as a CPA and C-suite executive provides him with a unique ability to bridge complex concepts with achievable goals. Known for his ability to clarify financial strategies and drive business success, Bill's presentations leave attendees equipped with the tools they need for long-term impact.

Bill is a trusted advisor and visionary leader who has guided businesses at every stage, from innovative startups to thriving public companies. Whether he's sharing insights on mergers and acquisitions, guiding companies through complex funding transactions, or helping organizations align their strategies for growth, Bill delivers results every time. His work with Fit for Life, a nonprofit championing mental health support, underscores his dedication to creating meaningful change both in and outside the boardroom..

YOU PREFER AN INTERACTIVE PRESENTATION

Bill's participant-centered approach fosters a positive and interactive learning environment. His sessions are rich in takeaways, offering strategies that attendees can immediately apply to their professional and personal goals. Whether he's speaking on financial growth strategies, operational efficiency, or leadership resilience, Bill adapts to ensure his content aligns with the event's theme and purpose.

Audiences are captivated by his warm demeanor, real-life examples, and practical guidance. He fosters an authentic connection that leaves a lasting impression, driving both individual growth and organizational success.

If you want a speaker who inspires action and provides lasting value, Bill Shenkin is the perfect choice. Meeting planners constantly praise his ability to captivate, educate, and empower.

EXTREME CUSTOMIZATION AND USABLE CONTENT

What sets Bill Shenkin apart is his hands-on approach to every event. He takes the time to understand your organization's goals and tailors each presentation to meet the unique needs of your audience. Drawing on his extensive experience across industries ranging from real estate and clean technology to professional sports and entertainment, Bill delivers insights that resonate with diverse audiences.

His engaging delivery style is combined with substantive content, ensuring that attendees leave with practical solutions they can implement right away. Bill's expertise goes beyond theory, offering real-world examples and strategies that drive measurable outcomes.

SUBSTANCE AND STYLE – NOT JUST “INSPIRATION”

Bill's speaking style is engaging, energizing, and thoroughly solution-focused. He's not just a motivational speaker; he's a thought leader who delivers value-driven content designed to inspire action. Attendees consistently rave about his ability to break down complex topics into relatable, actionable advice.

Through his presentations, Bill addresses the challenges organizations face today while providing a blueprint for success. He blends financial expertise with leadership insights, creating a compelling narrative that motivates teams and ignites progress.



RETURN ON INVESTMENT AND REAL EXPERTISE



SCOPE, REACH, AND PARTNERSHIPS

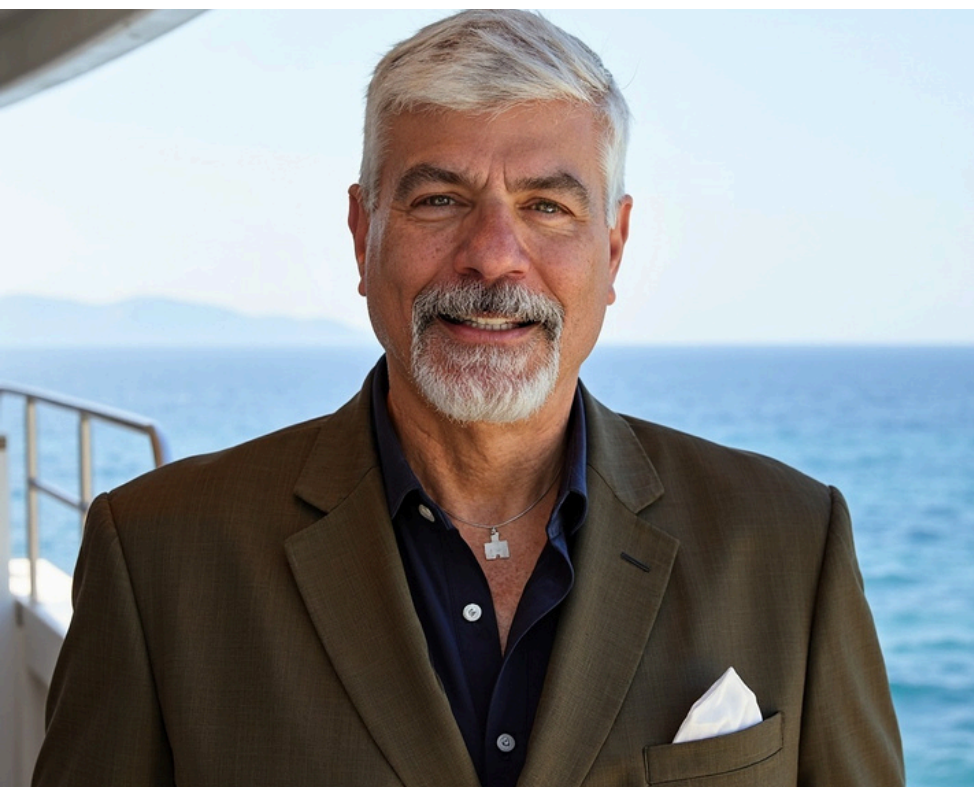
With decades of experience and a wealth of connections across industries, Bill offers a level of expertise that is hard to match. He has served on numerous boards, led major initiatives, and collaborated with top executives to achieve extraordinary outcomes. His proven track record makes him a trusted partner for organizations seeking impactful leadership development and strategic guidance.

Through his engagements, Bill can extend your organization's influence by offering customized seminars, high-level leadership workshops, or immersive strategy sessions that inspire peak performance.

ATTRACT, ENGAGE, AND WIN MORE CUSTOMERS

Bill's deep understanding of business and leadership equips him to work effectively with executives, management, and teams aiming to achieve their goals. By hiring Bill Shenkin, you're equipping your audience with proven strategies, actionable insights, and a renewed commitment to excellence.

Bill's presentations embody professionalism, credibility, and a passion for helping people succeed. If you're looking for a dynamic, results-driven voice to elevate your event, make Bill Shenkin your speaker of choice. Perfect for audiences eager to leave inspired and empowered!



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CONTACT US TODAY!

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Book Bill now: billshenkin.com

