



CHIEF FINANCIAL OFFICER

Opportunity Profile

Presented by:





OVERVIEW

Sid Harvey Industries, a family company with deep roots and a proud legacy of service, is seeking a Chief Financial Officer (CFO) to join its executive team. The CFO will play a key role in guiding the company's continued growth and financial health while upholding the relational, people-centered culture that has defined Sid Harvey's since 1931.

Reporting directly to the President and CEO, this hands-on leader will be both a strategic partner and a trusted steward of the company's financial wellbeing—someone who thrives in a collaborative, team-oriented environment and takes pride in doing work that feels personal, lasting, and grounded in integrity. While the owners are strongly pro-business and committed to profitable growth, they oversee the executive team of the company through the lens of their biblically inspired personal values, fostering a culture of respect, excellence, and purpose in all they do.



COMPANY SNAPSHOT

Headquarters	Garden City, New York
Founded	1931
Ownership	Family- and faith-based, privately held
Employees	690
Annual Revenue	\$460+ million
Locations	90+ branches across the Northeast, Southeast, Great Lakes, and Rocky Mountain regions
Products	50,000 SKUs total
Distribution & Manufacturing	15,000+ SKUs distributed from Wilkes-Barre, PA and 1,700+ proprietary products manufactured in Andrews, SC



HISTORY

The Sid Harvey story began in 1931 during the Great Depression, when founder Sidney W. Harvey saw the future of residential heating and opened a small second-floor office in Hempstead, New York. Through decades of innovation, integrity, and a focus on people, the company has grown into one of the leading names in Heating, Air-conditioning, and Refrigeration (HVACR) distribution and manufacturing.

Now in its fourth generation of family leadership, Sid Harvey Industries continues to combine the strength of its nationwide footprint with the warmth and trust of a family business. Many employees have been part of the Sid Harvey family for decades—over one-third for more than ten years, and nearly ten percent for thirty years or longer.

"Our success is directly attributable to the quality of our employees," says President and CEO Sid Harvey, grandson of the founder. "We are a company built on loyalty, honesty, and hard work—values rooted in faith and integrity that have guided us for nearly a century."

Mission, Vision & Values

Mission

To increase the profitability of its customers and suppliers by providing the products and services that will make them more successful.



Vision

- To be a leader in the HVACR industry by anticipating and adapting to future needs, such as the shift in heating, air-conditioning, and refrigeration technology to more efficient, sustainable, and environmentally friendly products.
- To be a company that builds in the United States and promotes sustainability through remanufacturing, recycling, and a commitment to reducing landfill waste.

Values

- **Customer Success:** A commitment to providing the products and services that make customers more successful.
- **Employee Focus:** A belief that the company's success is driven by customer-oriented, hard-working, trustworthy, and dependable people.
- **Sustainability:** A "Go Green" ethos through remanufacturing and American-made products.
- **Innovation:** A forward-thinking approach to industry changes, such as adapting to Ultra Low Sulfur and Biofuel mixes and addressing the additives needed for biofuel quality.

These values—established by founder Sidney W. Harvey—continue to shape the way Sid Harvey Industries serves its customers, leads its people, and strengthens its community.

ORGANIZATIONAL CULTURE AND LEADERSHIP

The Sid Harvey environment is invigorating, inspiring, and unique, providing an environment of professionalism and potential. Sid Harvey, CEO, exemplifies a pursuit of excellence, guiding the staff to uphold high standards in their work. Sid Harvey has established a sterling reputation nationwide, with Sid serving as the day-to-day visionary leader who makes the mission scalable and effective.

Sid Harvey's entire staff strives to be collaborative, develop vision effectively, and release and empower competent people to do their jobs. Sid Harvey is entrepreneurial (requiring a level of independence). This is a culture of "all hands helping." Care is taken to ensure staff members treat each other with dignity and respect and foster a healthy climate. This is a position for a team player. Each manager must value people and processes and lead and earn respect from others.

The ideal candidate for Sid Harvey will be proactive, energetic, and self-motivated, embodying a hands-on approach to their work. While driven by action, they understand the importance of maintaining a healthy balance between professional responsibilities and personal well-being. As a senior member of the Sid Harvey Senior Leadership Team, they will embrace the organization's values of collaboration, respect, and servant leadership, actively contributing to its mission and impacting lives.



Sid Harvey

President, CEO

Sid Harvey Industries is led by President and CEO Sid Harvey, who carries forward the family's founding values and long-term vision. The leadership team is collaborative, rooted in mutual respect, and united by a shared commitment to service—both to customers and to each other. The next CFO will join a stable, close-knit executive group that values open communication, trust, and a shared pursuit of excellence.

The President describes his personal mission simply: *to live in a way that reflects the love of Jesus, sharing God's Word as opportunities arise, and helping others experience the love, peace, and hope found in Him.*

Those interested can read his full mission statement [\[here\]](#).

What Others Say About The Culture at Sid Harvey's & The Next CFO

- The CFO will have a strong sense of how to balance cost controls with sales. They must see the bigger picture of how both are vital to our success.
- We are welcoming, personal, want to get to know people, and care about the individual and their families.
- There is a great loyalty and commitment across the board...we often have three generations concurrently serving Sid Harvey's.
- Sometimes the workload can be overwhelming, and we may be slower in adding head count.
- Continuing education is encouraged. Sid Harvey's will contribute to furthering an employee's education...we have had people gain certifications, undergraduate, and graduate degrees.
- There is a strong cohesion among the executive team.
- Sometimes decisions could be made more quickly and discussion around them can be protracted.
- We put families first and are flexible to accommodate needs.
- Finance may lean toward caution while Sales leans toward enthusiasm. The CFO bridges the two—partnering with Operations and Sales to turn good ideas into sustainable results.
- The employee tenure at Sid Harvey's is amazing. We have 40 plus year employees, often whose children have made careers at Sid Harvey.
- The CFO must have thick skin and the ability to push back appropriately, sometimes having to take no for an answer.
- Sometimes we are too lenient and should terminate; there are times we are over accommodating.
- You often cannot plan your day because the environment is ever-changing and fast-paced.
- We have good medical plans.
- I love being a mentor. Mentorship is part of our culture.

- A current slowness or lack of decision making can impede results.
- We have a huge culture of customer advocacy and offer educational services of all types to help our customers achieve their goals.
- Our team is long term always having the best interest of Sid Harvey's in mind.
- We are about peoples' souls—we have a pastor on staff.
- The CFO will need to streamline financial processes particularly around the ERP transition.
- We went from 121m to 465m revenue in 16 years, averaging 9% compound growth rate and 12.5 percent growth over the past 5 years.
- Our culture is comfortable but not complacent.
- The idea that Sid Harvey's will contribute to training and education makes for a stronger team.
- We have long-term and new team members who prefer their own technology processes which can complicate efficiency.
- We have a bent towards compassion; Sid knows many of the employees by name and their circumstances.
- Our ERP is in the process of being revamped. Ideally the CFO will have experience in an ERP upgrade though we have an incredibly talented IT department.
- Communication within the executive team can sometimes be lacking or vague.
- We operate as a family which brings incredible strengths...and sometimes challenges. We understand each person is unique and has gifts and abilities that add value to our organization.





POSITION OVERVIEW

Due to an exit for a private equity opportunity, Sid Harvey Industries is seeking its next Chief Financial Officer to provide strategic and operational leadership for the company's financial, accounting, and administrative functions.

The CFO will serve as a full partner to the President and Executive Team, combining strategic vision with hands-on expertise in finance, accounting, and operations. This individual will lead with both head and heart—offering sound financial judgment, clear communication, and a spirit of collaboration that supports the company's mission, culture, and long-term growth.

POSITION SUMMARY

The Chief Financial Officer will act as the company's financial strategist, trusted advisor, and operational leader. The role requires a blend of strong analytical and interpersonal skills, an ability to explain complex financial matters in plain language, and a commitment to teamwork and integrity.

The CFO will also oversee Human Resources, IT, and Legal functions, helping the organization prepare for future growth and succession planning. The successful candidate will demonstrate humility, decisiveness, and a sense of urgency—someone who can roll up their sleeves while keeping the bigger picture in mind.

PRIMARY DUTIES AND RESPONSIBILITIES

- Ensure all financial processes, reporting, compliance, and controls operate smoothly, accurately, and in alignment with both internal standards and external regulations.
- Direct budget planning, cost management, and forecasting to support the company's strategic and operational goals.
- Oversee treasury management, banking relationships, and shareholder communication and financial management for several real estate entities.
- Provide transparency and clear communication to the Executive Team regarding financial results, performance, and implications for the business.
- Lead and mentor a team of approximately 40 employees across Finance, Accounting, HR, and IT, including six direct reports.
- Evaluate and guide the company's ERP system transition, improving efficiency and access to actionable financial data.
- Manage compliance with federal, state, and local requirements while promoting a culture of accountability and continuous improvement.
- Negotiate leases, vendor agreements, and other major contracts to support the company's branch network and expansion.
- Actively participate as a collaborative member of the Executive Team, contributing to overall company strategy and culture.
- Serve as a culture-carrier—modeling honesty, humility, and care for employees at every level.



IDEAL QUALIFICATIONS

Education & Certification

- Bachelor's degree in Accounting, Finance, or related field; advanced degree (MBA or similar) preferred.
- CPA required.
- 10–15 years of progressive financial leadership experience, including at least 10 years in a CFO or senior financial role.

Experience & Leadership

- Proven success leading finance and accounting operations for privately held, multi-location, middle-market companies (\$100Million–\$1Billion in revenue).
- Background in wholesale distribution, mechanical trades, or manufacturing strongly preferred.
- Demonstrated excellence in financial reporting, budgeting, forecasting, audit oversight, and compliance.
- Experienced in managing IT, HR, and Legal functions, including prior involvement in ERP system evaluation or implementation.
- Track record of building and mentoring high-performing teams and developing future leaders.

Communication & Collaboration

- Strong communicator with the ability to convey complex financial information in a clear, accessible way.
- Proven collaborator who works effectively across departments and with executive leadership.
- Adept at balancing detail orientation with strategic insight to support company-wide goals.

Strategic & Operational Mindset

- Skilled in translating financial data into actionable strategies that drive growth and operational efficiency.
- Capable of navigating both high-level strategy and hands-on execution in a dynamic business environment.
- Exercises sound judgment, calm under pressure, and an ability to anticipate and solve problems proactively.

Cultural & Relational Fit

- A service-oriented, “people first” leader who values relationships and teamwork.
- High emotional intelligence with a grounded, steady leadership presence.
- Alignment with the company’s people-based, and the Board of Directors faith-based culture, leading with integrity, humility, and respect.



LOCATION AND COMPENSATION

This position is based at Sid Harvey Industries' headquarters in Garden City, New York. The company offers a competitive base salary and incentive compensation plan tied to performance goals, along with a comprehensive benefits package. In keeping with its family-oriented values, Sid Harvey Industries also supports the continued growth and development of its team—covering the cost of approved educational pursuits with no repayment obligation.

THE SEARCH PROCESS

If you or someone you know is interested and meets most of the qualifications outlined in this profile, please contact us or recommend them for consideration. Alternatively, you may forward this information to them. Thank you.

Send your resume to the contact below.

Candidates can rest assured that their names will be handled discreetly, and their inquiries will be treated with the utmost confidentiality.

Sid Harvey's is an equal opportunity employer and does not discriminate based on race, age, religion, color, gender, national origin, familial status, veteran status, or mental/physical disability.

We understand and fully respect the need for confidentiality of information provided by interested parties. Be assured that backgrounds and interests will not be discussed with anyone, including our client, without prior consent. Additionally, reference contacts will not be made until mutual interest has been established.

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