

FIRM RESUME

OUTSOURCED CFO, CONTROLLER,
ACCOUNTING, AND FINANCE EXPERTS

2005
Founded in Salt Lake City, UT

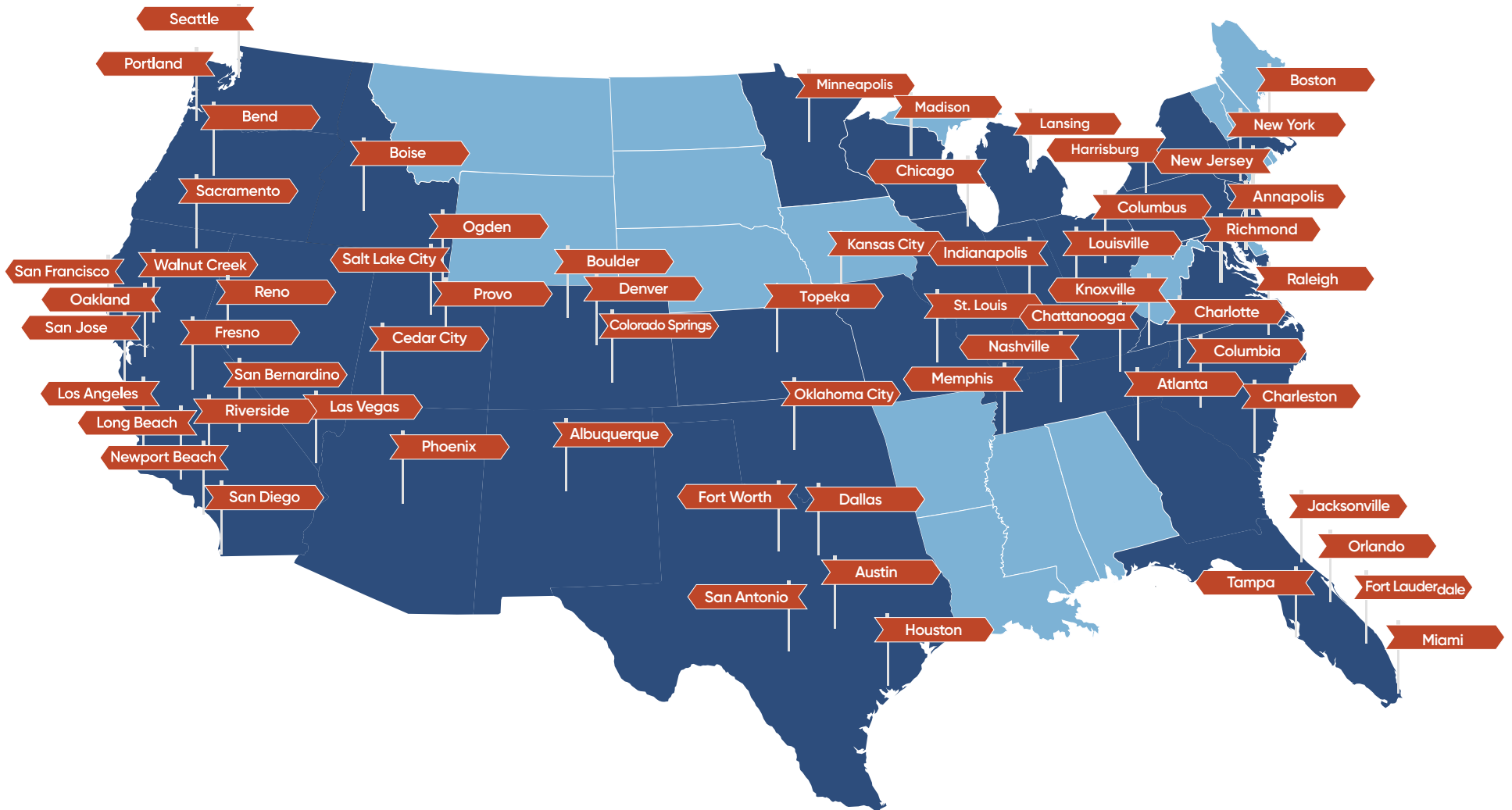


WHO WE ARE

THE CFO
SOLUTION
FOR MODERN
BUSINESSES



OUR LOCATIONS



**FINANCIAL
VISIBILITY
=
SMARTER
BUSINESS
DECISIONS**

FINANCIAL DATA MUST BE:

Accurate

Timely

Relevant

Insightful

INDUSTRY EXPERTISE



M&A



HEALTHCARE



TECHNOLOGY



MANUFACTURING



LIFE SCIENCES



BUSINESS SERVICES



REAL ESTATE



AUTOMOTIVE



ERP SYSTEMS



AGRICULTURE



CONSUMER PRODUCTS



INFRASTRUCTURE



NONPROFITS



ENTERTAINMENT



RETAIL



FOOD & BEVERAGE



CONSTRUCTION



HOSPITALITY



TELECOM



ENERGY



CFO STRATEGY

Modeling & Forecasting
Capital Raise
Exit Strategy
Mergers & Acquisitions
Governance & Compliance
Compensation Modeling
Audit Preparation



CONTROLLER ANALYSIS

Cash Flow Forecasting
Month-End Close
Budgeting
Internal Controls
Financial Dashboards
Financial Reporting
Systems Implementation



STAFF ACCOUNTANT EXECUTION

Bank Reconciliation
Journal Entries
GL Maintenance
Chart of Accounts
Accounts Payable
Accounts Receivable
Inventory Management

1

BUSINESS ACCOUNTING & FINANCIAL STATEMENTS:

Precise financial statement preparation to accurately reflect your business's performance.

2

INTERNAL CONTROLS:

Implementation of internal control systems to safeguard assets and maintain financial integrity.

3

SEC COMPLIANCE & REPORTING:

Expert guidance on SEC compliance and reporting, ensuring adherence to regulations.

4

MODELING & FORECASTING:

Customized financial modeling and forecasting to support informed strategic decisions.

5

ANNUAL OPERATING PLANS & FINANCIAL STRATEGIES:

Comprehensive annual budgets and financial strategies to align with your business objectives.

6

STAFF TRAINING:

Training designed to empower your team with essential financial skills and knowledge.

7

BOOKKEEPING:

Expense tracking, invoicing, and account reconciliation to keep your financials accurate and up to date.

8

AUDIT PREPARATION:

Comprehensive audit preparation services to ensure a smooth and efficient audit process.

9

INVENTORY MANAGEMENT:

Inventory management solutions to streamline tracking and control costs.

10

M&A PREPARATION:

M&A support by preparing financials and managing due diligence.

11

SYSTEMS AND SOFTWARE IMPLEMENTATION:

Seamless integration and implementation of various accounting systems and software.

12

ACCOUNTING CLEAN-UP:

Accounting clean-up services to reorganize and correct your financial records.

REMOTE ACCOUNTING

ACCOUNTING SERVICES, FROM ANYWHERE



A Larger
Talent Pool



Flexible
& Adaptable



Tailored
Services

ACCOUNTABILITY (CONTROLLER OVERSIGHT)

We provide quality control services with Controller-level oversight and project management.

VETTED RESOURCES

We have 20+ years of experience of systematically recruiting accounting roles, and our talent pool is readily available.

ACCOUNTING

- Monthly Book Closing
- Monthly Financial Statements
- Small Business Accountants
- Financial Analysis

AP & AR

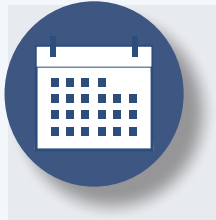
- Bill & Payment Processing
- Invoicing & Collections
- Expense Reporting
- Vendor Invoice Verification

RECONCILIATIONS

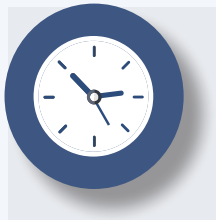
- Statements Reconciliation
- Merchant Account Reconciliation
- Transaction Coding
- Invoice Reconciliation

PAYROLL

- Payroll Input & Data Validation
- Transmission to Provider
- Maintain Employee Records
- Payroll Report Generation



FRACTIONAL



HOURLY



PROJECT BASED

ADVANTAGES OF OUTSOURCED ACCOUNTING

GAIN EXPERTISE

SAVE TIME & MONEY

ELIMINATE ERRORS

ENHANCE EFFICIENCY

INCREASE PROFITABILITY

WE HAVE TRUSTED RELATIONSHIPS

CPA FIRMS
ATTORNEYS
BANKERS
INVESTORS
INSURANCE
IT SERVICES
MERCHANT SERVICES
PAYROLL PROVIDERS

- **BENEFIT EXISTING CLIENTS**
- **GROW YOUR PORTFOLIO**



These partnerships enable us to provide our clients with a broader range of services and expertise. By leveraging these partners knowledge and resources, we offer a holistic approach to financial management and contribute even more to the success of our clients businesses.

PLACEMENT SERVICES



NOW CFO has years of experience placing employees for top companies using advanced techniques.

We distinguish ourselves from competitors by utilizing a unique candidate selection process. We rely on our experienced team of CFOs to conduct rigorous technical interviews to assess candidates' cultural fit as well as their high-level accounting expertise specific to the role they are seeking.



We screen skilled candidates for accounting, finance, and back office roles across various industries.



We offer discount savings between 7-10% under market costs.



Find your candidate with our streamlined 30-day process.



The newly recruited employee will be fully prepared to take on their assigned role.



You will be partnered with a recruitment specialist to get the best outcome.



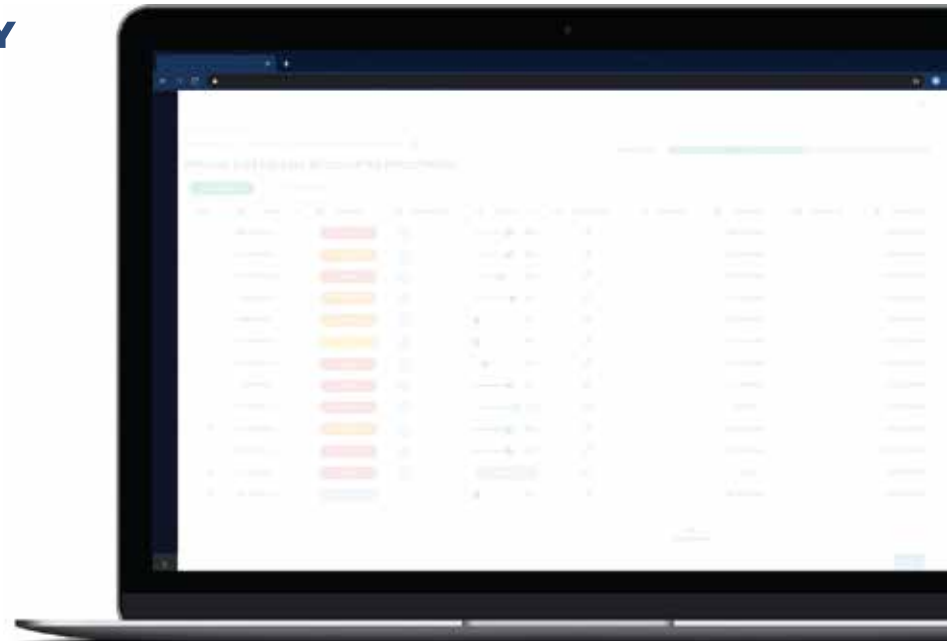
We deliver high-value service by finding the right person for the job at a reasonable price.

BIZVUE: BUSINESS COLLABORATION TOOL

As the ultimate business collaboration tool, BizVue allows you to easily keep track of all your projects and their associated time and expenses, plus invite your clients to collaborate on projects right in the same platform.

TRANSPARENCY IS JUST A FEW CLICKS AWAY

- ✔ UP-TO-DATE PROJECT VISIBILITY
- ✔ TRACKABLE PROJECT STATUS
- ✔ DETAILED TIME TRACKING
- ✔ CLIENT & TEAM COLLABORATION
- ✔ CONSTANT COMMUNICATION
- ✔ NOTIFICATIONS & MESSAGING



BIZVUE SERVICES

AN UNPARALLELED LEVEL OF TRANSPARENCY AND COLLABORATION

PROJECT MANAGEMENT

CAPABLE BUT EASY TO USE
PROJECT MANAGEMENT TOOLS

PROJECT-BASED TRACKING

ACCURATE INVOICES WITH TIME
TRACKED PROJECTS

CLIENT MANAGEMENT

COLLABORATE DIRECTLY WITH
TEAM MEMBERS

ORGANIZATIONAL MANAGEMENT

FLEXIBLE AND SCALABLE
ORGANIZATION HIERARCHIES

THE COMPANY WE KEEP



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