



FIRM RESUME

OUTSOURCED CFO, CONTROLLER,
ACCOUNTING, AND FINANCE EXPERTS

WHO WE ARE

**The Outsourced
CFO Solution For
Modern Businesses**



2005

Founded in Salt Lake City, UT



50+

Locations



150+

Accounting Systems Expertise



50+

Industries Served



15,000+

Happy Clients



400+

Employees

OUR FOOTPRINT



In person offices

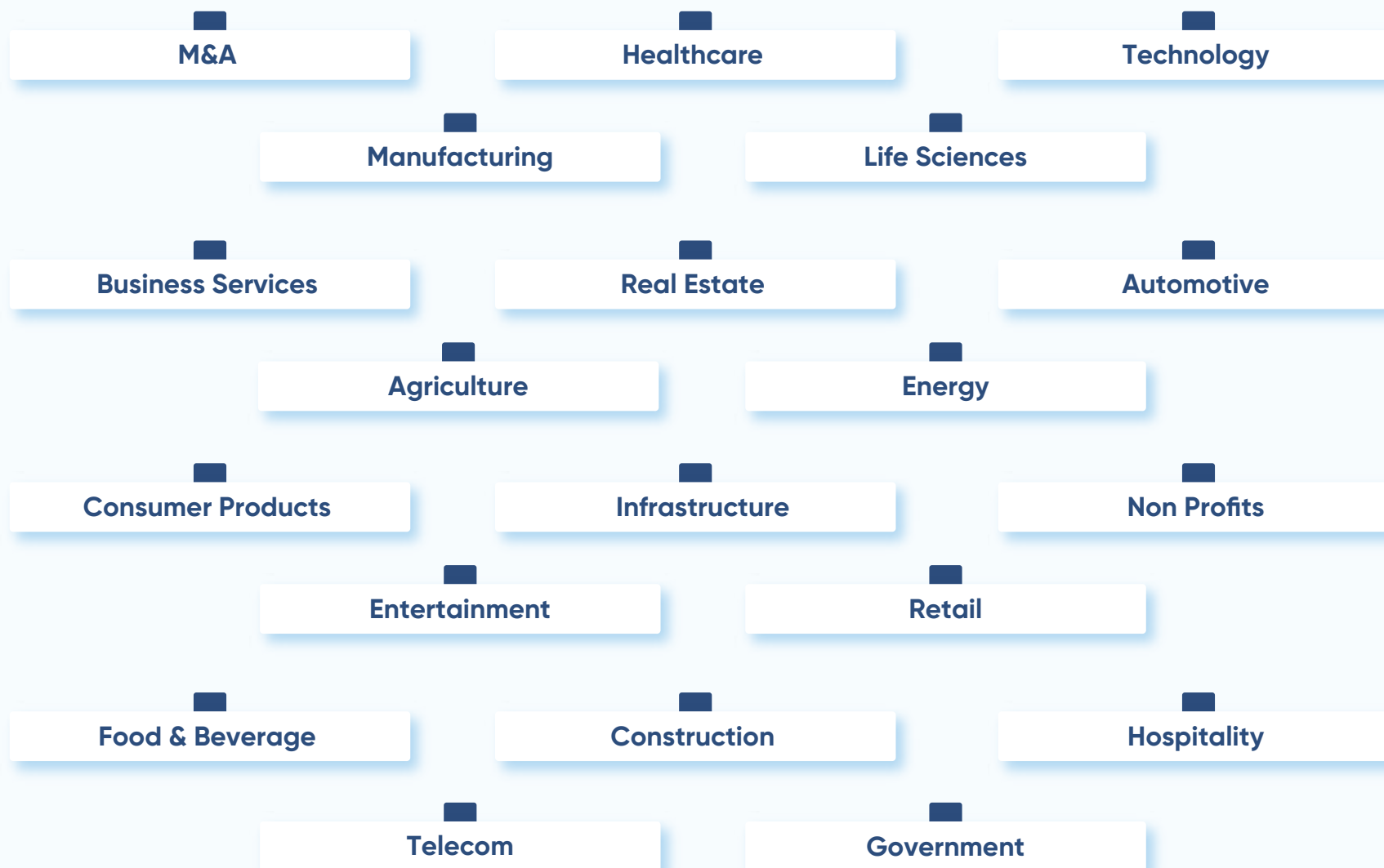


Remote offices

FINANCIAL VISIBILITY = SMARTER BUSINESS DECISIONS



INDUSTRY EXPERTISE



OUR CORE VALUES



OUTSOURCED EXPERTS



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

OUR SERVICES

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.

OUR SERVICES

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 & 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

Remote Accounting That Feels In-House



Larger Talent Pool



Flexible & Adaptable



Tailored Services



Industry Expertise

1

Accounting & Reporting

Accounting +
Reconciliations

2

Cash Flow Operations

AP & AR

3

Payroll & Compliance

Payroll + Oversight
+ Resources



Accountability:

Dedicated Controller oversight: Quality control services with Controller-level oversight and project management.



Vetted Resources:

20+ years of experience systematically recruiting all levels of accounting roles.



24/7 Visibility:

Clear insights into the tasks that are being completed and status updates.

REMOTE ACCOUNTING

ADVANTAGES OF OUTSOURCED ACCOUNTING



Fractional



Hourly



Project Based

- ✓ Industry Expertise
- ✓ Save Time & Money
- ✓ Eliminate Errors
- ✓ Enhance Efficiency
- ✓ Increase Profitability

FIXED-FEE ACCOUNTING PROJECTS

Ongoing service. Ongoing growth.

If hourly isn't the right fit right now, NOW CFO offers subscription-based engagements. We recognize every business has different goals and we're here to support.





EXECUTIVE SEARCH FOR ACCOUNTING & FINANCE

Permanent Placement Services

1

Streamlined 30-day search from intake to accepted offer.

2

CFO-led technical vetting to ensure real, hands-on capability.

3

Role-readiness assurance: We fully vet candidates to step into the assignment on day one.

4

Cost advantage: Our placement fees are typically 7–10% below prevailing market rates, without compromising quality.

PLACEMENT SERVICES

Our 30-Day Process

Define & Map

Role scorecard, culture brief, compensation targets, market map, and outreach.

Deep Diligence

Panel interviews, case exercise, reference checks, and systems/GAAP competency confirmation.

WEEK 1

WEEK 3

WEEK 2

WEEK 4

Source & Screen

Targeted sourcing, behavioral screens, and **CFO-designed technical assessments.**

Select & Secure

Final interviews, comp alignment, offer support, and a 30-60-90 onboarding plan.

BIZVUE:

Business Collaboration Tool

Progress you can track

As the ultimate business collaboration tool, BizVue allows our clients to easily keep track of all projects, time, and expenses in one place.

Clients get 24/7 visibility into their consultants' work and are able to collaborate together right inside the platform.



THE COMPANY WE KEEP



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EXPERIENCE THE POWER OF OUTSOURCED FINANCIAL EXPERTISE



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