DILLON BUSINESS ADVISORS

Client Accounting and Advisory Services

CFO Client Meetings

CFO-led meetings offer invaluable benefits to clients. CFO-led client meetings build a strong connection and foster a relationship of trust. These conversations will allow you to align business and tax strategies with your clients' short and long-term goals. The value of this service lies in the personalized attention and tailored guidance you provide. By addressing specific client needs, you can optimize your clients' financial performance and tax position. With this service you not only provide valuable financial and tax advice, but you empower your clients with the resources to help improve their businesses and leadership.

At DBA, we are committed to adding value and supporting your financial success. CFO-led meetings immediately provide recurring revenue to your firm and can lead to future service opportunities with clients, as well as, giving clients more reason to refer you their peer and network.

Benefits of CFO Client Meetings

- Increased client satisfaction
- Increased recurring revenue
- Additional service opportunities
- Increased business value
- Clients become advocates and referral sources
- Increased personal fulfillment

CFO Services

CFO Client Meeting Outline

10 min — **Connection**
-personal catch up

30 min — **Values and Priority Investigation**
-What is keeping you up at night?
-What currently has your attention?

20 min — **Financial Analysis**
-Financial statement highlights
-KPIs progress review

45 min — **Strategy**
-Adjustments needed for KPI progress
-Tax savings opportunities
-Revenue opportunities
-Additional investment/business opportunities

15 min — **Action Plan**
-Clarify and restate client priorities
-Create client action plan