

Client Accounting and Advisory Services

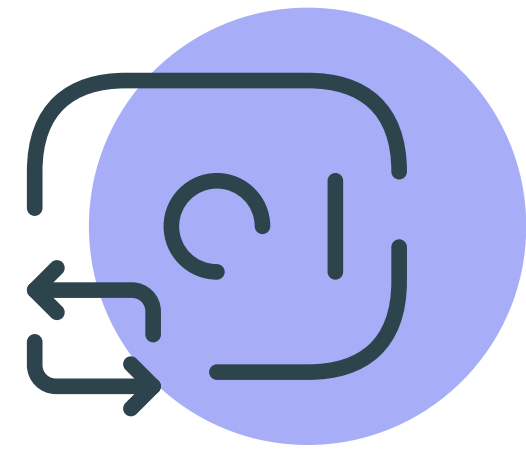
CFO Meeting in 5



1

Connection

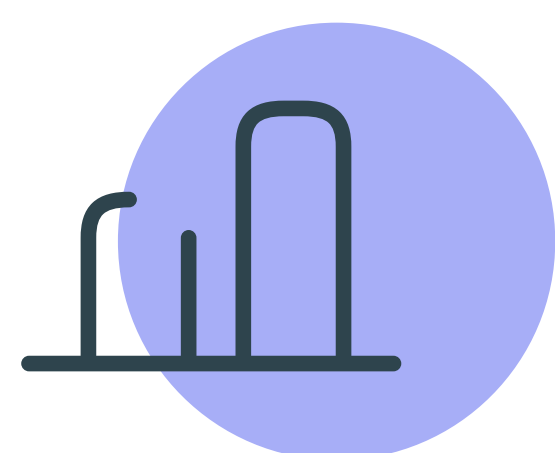
Build rapport by catching up with the client on a personal, friendly level.



2

Values and Priority Investigation

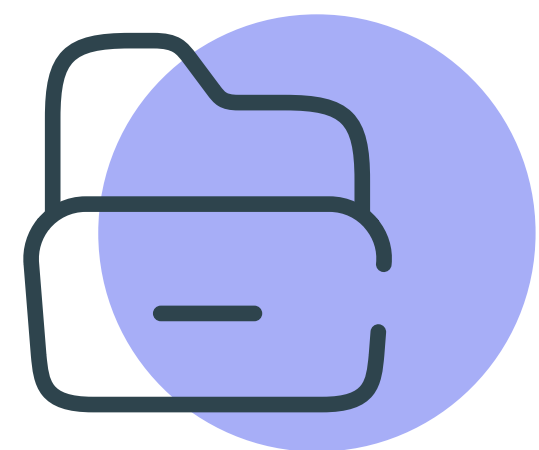
Investigate the client's values and priorities through asking open-ended questions with the intent to understand and collaborate.



3

Financial Analysis

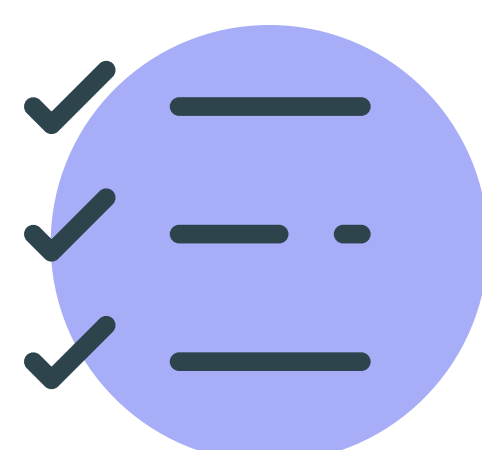
Dedicate time to discuss the client's financial statements and KPI progression.



4

Strategy

Present necessary adjustments, improvement areas, and new opportunities to help the client's business and leadership flourish.



5

Action Plan

Develop an action plan based on the client's top priorities that will allow the client to execute and make progress between their scheduled CFO meetings.
