

Essentials Financial Clarity & Control <i>starting at</i> \$3,000 / month For founders or small finance teams that need accurate accounting, clean books, and better visibility into financial performance Scope - Monthly bookkeeping & reconciliations oversight - Financial statements (P&L, Balance Sheet, Cashflow) - Chart of accounts optimization and standardization - Basic KPI dashboard - Basic cash flow tracking and variance reporting - Coordination with tax preparer or CPA firm - Monthly check-ins with your finance lead - Email support (ongoing) Optional add-ons - Catch-up or cleanup accounting (project-based) - Migration to QuickBooks Online - Accounting system optimization Goal <i>Build a clean financial foundation and confidence in your numbers.</i>	Growth Fractional CFO Support <i>starting at</i> \$4,500 / month For growth-stage companies ready for real financial strategy, strategic planning, and actionable insights Scope - Everything in Essentials, plus: - Rolling 12-month financial forecast - Monthly financial review with CFO - Budget vs. actual reporting & analysis - Bi-Weekly CFO check-ins with ownership or leadership - Cash flow forecasting & scenario modeling - CFO-level analysis & recommendations - Expense analysis and margin optimization - Department-level KPI dashboard Optional add-ons - Business intelligence (Power BI or similar) - Forecast integration with CRM or ERP Goal <i>Move from reactive accounting to proactive financial strategy.</i>	Strategic Full CFO Leadership <i>starting at</i> \$5,500 / month For established or PE-backed companies seeking executive-level finance leadership - full strategic partnership, performance management, and board-ready insights Scope Everything in Growth, plus: - Comprehensive FP&A model - Board or investor reporting - Capital planning & profit optimization - M&A readiness and due diligence support - Finance team mentorship or oversight - Banking, lending, or equity raise support - Ongoing strategic advisory to CEO / ownership group - Quarterly strategic finance review sessions - Banking & financing relationship support Optional add-ons - Transaction support / M&A modeling (project) Goal <i>Deliver CFO-level partnership and data-driven growth across your organization.</i>
--	---	---