

UI

Upward Insights

UI WAS BORN OUT OF FRUSTRATION

WORKING FOR CPA FIRMS & OUTSOURCED FINANCIAL SERVICE PROVIDERS, WE SAW HOW **ENTREPRENEURS WERE BEING UNDER-SERVED**

THOSE WHO COULD DELIVER QUALITY AND SOPHISTICATION WERE TOO EXPENSIVE.
OTHERS WERE CHEAP, BUT COULDN'T DELIVER

ALL OF THEM FOCUSED ON THE
WRONG THINGS

IT'S NOT ABOUT
ACCOUNTING & BOOKKEEPING

**HIGH GROWTH
BUSINESSES NEED HELP
BUILDING THE
FINANCIAL
FOUNDATION**

PEOPLE SYSTEMS PROCESSES

FINANCE TEAM PACKAGE SERVICES

CFO Advisory
Analytics & KPIs
Financial Reporting
Accounting Services
Accounting Workflow Management
Financial System Management
Financial Procedures Management

TAX SERVICES

Federal & State Tax Filing
Payroll tax filing
Forms 1099 filing

CFO SERVICES

Cap Table Modeling
Ownership Exit Modeling
Ownership Dilution Modeling
Ownership Exit Tax Modeling
Tax Avoidance Strategy (Eliminate Tax on Exit)
Financial Strategy Development
Financial Modeling
Revenue Modeling
Fundraising Due Diligence Assistance
KPI Development & Management
Part-Time CFO

CONTROLLER SERVICES

Financial Reporting Procedures
Quality Control Procedures
Quality Control Review
Financial & Analytic Systems Set Up & Management
Restructure & "Backbuild" Financials

