

Financial Accounting • Fraud Prevention • Team Development

Corporate expertise for small businesses and public sector finance and accounting projects

Advisory Services

- Bookkeeping
- Investment advice
- · Preparation of annual budget
- Business process improvement
- · Financial planning and budgeting
- Monthly budget variance analysis
- Strategic planning consulting services
- · Cash flow projection and management
- QA/QC of accounting clerk transactions
- Financial management consulting services
- Monthly financial statement preparation and/or review
- Financial systems review and upgrade; implement automation
- Interface with outside CPA, auditors, insurance brokers, lenders, landlords

Finance Department Rebuild

- Department recruitment, staffing, training, and mentorship
- Financial systems implementation and integration
- Creation and implementation of Financial Policies & Procedures
- Oversight (RFP, selection, and setup) of outside CPA

Clients often start with a department rebuild and move on to advisory services

Coverage up to fulltime provided as needed



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NAICS Codes

541611 - Administrative & General Management Consulting 541219 - Other Accounting Services

Prioritize

523930 - Investment Advice

UNSPSC Codes

84111502 - Accounting and bookkeeping services 80101603 - Economic or financial evaluation of projects

Clients Include

Los Angeles Museum of the Holocaust

Kitten Rescue

The Gabriella Foundation

Avison Young

National Association of Minority Contractors

Monkish Brewing Company

Vonge, LLC

BetterRX

Malibu Green, LLC

Credentials





