



CAPABILITY STATEMENT

Accounting • Financial Management • Advisory • Program Support

CLARITY. STRATEGY. GROWTH.

UEI P5GPVXZ9J119	CAGE 9KCY9	SAM Registered	PURCHASE CARD Accepted
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COMPANY OVERVIEW

Affluent Consulting Group is a full-service accounting, tax, and advisory firm that helps individuals and businesses achieve financial confidence through proactive tax planning, accurate accounting, strategic CFO advisory, and practical business consulting. Whether you're filing your first tax return, growing a successful company, or preparing for your next stage of growth, we provide the strategy, clarity, and guidance you need to make informed financial decisions.

CORE COMPETENCIES

FINANCIAL MANAGEMENT & ACCOUNTING

Reconciliations, financial reporting, budgeting, job costing, close support, accounting cleanup, and multi-entity reporting.

CFO & MANAGEMENT ADVISORY

Cash-flow analysis, financial readiness, performance reporting, operational planning, and management decision support.

PROJECT & PROGRAM SUPPORT

Project coordination, implementation planning, stakeholder communication, performance tracking, and technology project management.

INTERNAL CONTROLS & PROCESS IMPROVEMENT

Risk review, workflow redesign, SOP development, documentation, implementation support, and repeatable control procedures.

TAX COMPLIANCE & REMEDIATION

Individual and business tax preparation, proactive tax planning, compliance support, and multi-year catch-up engagements.

FINANCIAL SYSTEMS, ANALYTICS & TRAINING

Accounting-software configuration, requirements analysis, dashboards, reporting, process automation, systems training, QuickBooks, and financial literacy.

WHY AFFLUENT CONSULTING GROUP

- 30+ years of combined experience across accounting, finance, operations, project management, and business advisory.
- Delivery supported by Lean Six Sigma Green Belt capability and Intuit QuickBooks ProAdvisor expertise.
- Process-improvement focus connecting accurate financial data, stronger controls, repeatable workflows, and practical implementation.
- Cross-industry experience in construction, hospitality, healthcare, transportation, property management, professional services, and small businesses.
- On-site support in Louisiana and Mississippi with remote service nationwide.
- Purchase-ready with active SAM registration, UEI, CAGE, and government purchase-card acceptance.

JOCYLYNN COLEMAN
Chief Executive Officer

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AFFLUENTCONSULTING.ORG
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REPRESENTATIVE EXPERIENCE

Representative examples are stated conservatively. Customer names, periods of performance, contract values, references, and supporting records are available for buyer due diligence.

FINANCIAL MANAGEMENT & PROCESS IMPROVEMENT Hospitality and Development	Supported multi-entity accounting and project reporting for a portfolio that included multiple hotel-development projects. Strengthened deposit controls, reconciliations, job costing, and monthly-close procedures; developed repeatable workflows to improve reporting consistency and management visibility. KEY PERSONNEL EXPERIENCE PRIVATE SECTOR
ACCOUNTING SYSTEMS & REPORTING Property Management	Configured and remediated QuickBooks and property-management accounting workflows. Organized property- and entity-level tracking; established recurring reconciliations and owner reporting to improve accuracy, transparency, and financial visibility. PRIME CONSULTANT PRIVATE SECTOR
TAX & ACCOUNTING REMEDIATION Service-Based Businesses	Reconstructed books from bank and platform data, categorized transactions, resolved entity and recordkeeping issues, and completed multi-year individual and business tax work to restore compliance and support forward-looking planning. PRIME CONSULTANT PRIVATE SECTOR

NAICS CODES

NAICS	DESCRIPTION
541211	Offices of Certified Public Accountants
541219	Other Accounting Services
541611	Administrative Management and General Management Consulting Services
541618	Other Management Consulting Services
611430	Professional and Management Development Training
561110	Office Administrative Services

SOCIOECONOMIC STATUS & CREDENTIALS

- Woman-Owned Small Business, self-identified
- Socially and Economically Disadvantaged Business Enterprise (SEDBE)
- Minority-owned small business
- Louisiana Hudson Initiative Certified
- Women's Entrepreneurship Certificate, eCornell University
- Lean Six Sigma Green Belt
- Intuit QuickBooks ProAdvisor

CREDENTIALS & AFFILIATIONS

