

# FREE FINANCIAL CONSULTATION

For CEO CI Coaches, Clients, and Guests








CFOs | Controllers | Strategic Consulting | Capital Advisory | Systems Experts

## ABOUT PREFERRED CFO

Preferred CFO is a high-level strategic outsourced CFO firm. While we're experts in historical financials, the most impactful strategy we bring to organizations is implementing a higher level of forecasting and strategy to scale and accelerate growth, optimize resources, overcome obstacles, and maximize shareholder value.

## WHY WORK WITH US?

Preferred CFO is the most experienced outsourced fractional CFO team in the United States.

-  Our CFOs are dedicated resources to Preferred CFO ensuring continuity, team knowledge, and high standards
-  CFOs are matched by industry & expertise, not proximity
-  Pure, unencumbered financial advisory with obligations only to the CEO/Owner/Board
-  Strategic financial leadership to integrate with or augment your existing teams
-  More cost-effective and efficient than hiring a full-time CFO

## OUR SPECIALTIES

Preferred CFO offers high-level CFO services and advisory.



### STRATEGY & FORECASTING

- 13-week cash-flow management & projection
- 5-year monthly forecasting (P&L, BS, & CF)
- 12-month rolling forecast updated monthly
- Budgeting & actual-to-budget reporting



### COST & SYSTEMS OPTIMIZATION

- Cash flow analysis and optimization
- Improved financial systems & reporting
- Maximizing profitability & transparency



### LENDER/INVESTOR-READY FINANCIALS

- Accurate accrual-basis financial statements
- Audit-ready & due-diligence-ready financials
- Timely monthly reporting & analysis



### FINANCIAL ADVISORY

- Raising capital & evaluating potential deals
- Financial tools, systems, and automation
- Contract structure, billing, & collections
- M&A modeling, diligence, or integration

LET'S TALK: 801-804-5800

Or reach out at: [www.preferredcfo.com/contact-us](http://www.preferredcfo.com/contact-us)

# Preferred CFO Services

## FRACTIONAL CFO SERVICES

For companies and businesses that need high-level financial guidance and leadership without the cost of a full-time CFO, our fractional CFO services offer flexible, strategic, and tailored support. We step in to provide the financial leadership you need, when you need it - and for however long you require.

## OUTSOURCED CFO SERVICES

Gain a full finance strategy team at your side. Our outsourced CFOs manage everything from financial forecasting to investor reporting, giving you the benefits of executive-level financial leadership without the overhead of an in-house hire. We also can provide controllers, bookkeepers, and accountants

## CFO CONSULTING EXPERTS

Need help solving a specific financial challenge, one-off project, or preparing for a big move? Our CFO consultants are brought in to troubleshoot, assess, and elevate your financial operations from the top down. Whether you're experiencing cash flow issues, rapid growth, or a change in leadership we can help you effectively and professionally.

## VIRTUAL CFO SERVICES

Our virtual CFO services provide real-time, high-level financial expertise—no matter where you're located. With remote access to dashboards, reports, and strategy sessions, you get the same leadership and accountability without geographic limits

## OUTSOURCED HR SERVICES

Let us handle your HR needs without the overhead of a full-time internal team. We offer day-to-day HR support, fractional leadership, and long-term strategic guidance that keeps your people operations running smoothly and in line with your business goals. No organization is too big or too small to benefit from the HR expertise that we offer



**CEO coaches help leaders grow. Preferred CFO strengthens that work with financial leadership that clarifies the path forward and supports every major decision. Together, we help your clients reach their goals with more certainty and less guesswork.**

**We give you the confidence of knowing.**