

Grow and Inform

Operational CFO Solutions



FOCUS + URGENCY + ACCOUNTABILITY

Our team knows that successfully growing a business requires focus and urgency. As a business grows it becomes more difficult to concentrate on the right things needed to excel. In our role, we drive a new level of accountability from the top down helping the business to remain on course. Together we develop a clear and executable strategy for the business. We then create an action plan with deadlines designed to achieve the strategic goals. Finally, through timely and relevant management reporting, we track progress through a continuous review of the “state of the state.”

A FRAMEWORK FOR DECISION-MAKING

Through our work with hundreds of businesses, we have developed effective decision tools to frame many of the important decisions that face a growing company. By concentrating on the essential criteria for effective decision-making, we validate the invaluable sixth sense of the entrepreneur – his or her “gut”. Whether it is expansion planning, measuring sales and marketing effectiveness, modeling the right employee mix, or compensation incentives to maximize profits, we have the tools to help.

A TEAM FOR GROWING YOUR BUSINESS

At **Verge Advisors**, we have built a unique service model based on:

Real-World Experience: In addition to acting as the CFO for many growing businesses, each member of our team has started and operated their own business. The cumulative knowledge from these experiences enables us to provide better and more informed counsel to you.

Big Firm Skills: With backgrounds in audit, forensics and tax from preeminent national and regional CPA firms, we apply best practices in financial oversight, compliance, and internal controls.

Proven Network: Through our continued work on common business issues, we have built an extensive network of service providers and connections. These trusted relationships can help in many aspects of growth and we are more than willing to connect the dots.

Fixed Price: Our services are fixed-price, offering you expertise at a fraction of the cost of a full-time CFO. Please call or email us whenever you need us, the meter is not running.

Visit us at <http://www.VergeAdvisors.com/grow> or call us at **617.401.2520** for more information.

OFFERING HIGHLIGHTS

> Strategic Planning

- Refine existing strategy
- Develop action plans
- Measure ROI, track progress

> Cash Flow Management

- Forecast cash needs
- Control expenses
- Maximize return on cash

> Develop Processes & Controls

- Improve accounting infrastructure
- Internal control oversight
- Technology & Ops integration
- Process standardization

> Franchise Support

- Identify expansion triggers
- Model location profitability
- Evaluate space requirements

> Management Reporting

- Expedited monthly closes
- Financial reporting packages
- Dashboards
- CFO analysis

CUSTOMER PROFILE

>Location

- Greater Boston Area

>Revenue

- Annual revenue from \$1-\$50M

>Ownership

- 1-5 Owners

>Headcount

- Up to 100 employees