

## Client Accounting and Advisory Services

# CFO Meeting in 5

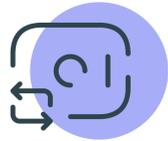
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# 1

## Connection

Build rapport by catching up with the client on a personal, friendly level.



# 2

## Values and Priority Investigation

Investigate the client's values and priorities through asking open-ended questions with the intent to understand and collaborate.



# 3

## Financial Analysis

Dedicate time to discuss the client's financial statements and KPI progression.



# 4

## Strategy

Present necessary adjustments, improvement areas, and new opportunities to help the client's business and leadership flourish.



# 5

## Action Plan

Develop an action plan based on the client's top priorities that will allow the client to execute and make progress between their scheduled CFO meetings.

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