

TURN ON THE HEADLIGHTS

Empowering CEOs with a more forward-looking strategy to see the road ahead.

CFOs | Controllers | Expert Systems Advisors | Strategic Consulting

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 employees, not freelance contractors, which assures continuity, consistency, team knowledge, & rigid standards
- ✓ CFOs are matched based on industry experience & expertise, not on proximity.
- ✓ Pure, unencumbered financial advisory with obligations only to the CEO/Owner/Board.
- ✓ Strategic financial leadership to integrate with or augment existing teams.
- ✓ Less costly and more efficient than a comparably experienced 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: 801-804-5800x1

FREE NO-OBLIGATION CONSULTATION FOR VISTAGE CHAIRS & MEMBERS

Preferred CFO offers Vistage chairs & members a free consultation with an industry-leading CFO to discuss specific or general financial concerns and/or provide financial system improvement recommendations.

During this consultation, we help evaluate:

- Cash management strategies to extend your runway
- Capabilities & performance of your current financial team
- Financial tools to assist in recovery & navigate growth
- Quality of historical and forward-looking financials

HOW CAN WE HELP?

Preferred CFO's strategic financial services are most effective with small- to mid-sized companies looking for ways to optimize resources and strategies, remove obstacles to growth, maximize profitability & shareholder value, and provide CEOs with a more forward-looking, strategic financial vision.

- Private Companies
- Revenues between \$3-50M annually
- May have experienced cash flow challenges
- Need better financial modeling & forecasting
- May require debt or equity financing
- Experiencing growth and/or growth challenges
- Have no CFO or an underqualified CFO

PLEASE SEND REFERRALS OR INQUIRIES TO:



Scott Crawford

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Development, Client Prioritization*

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