Preferred CFO

Preferred CFO is an expert CFO firm providing affordable part-time CFO services and expertise using proven tools and methodology for reliable outcomes. We help businesses accelerate growth, overcome obstacles, and maximize shareholder value.

WHY CHOOSE PREFERRED CFO?

While Preferred CFO is strong in ensuring quality historical financials, what sets us apart is our ability to help CEOs become more forward-looking. Each of our successful partnerships begins with a detailed financial forecast to project a short- and long-term plan for growth. This forward-looking strategy and forecast becomes the blueprint for growth and success.

OUR SPECIALTIES

- 5-Year Forecasting (P&L, Balance Sheet, & Cash Flow)
- High-Level Strategy
- Raising Capital
- Cash Flow Management
- Budgeting & Actual to Budget Reporting
- Optimizing Systems & Operations
- Timely & Reliable Monthly Reporting

CUSTOMER PROFILE

Preferred CFO's strategic financial services are most effective with small- to mid-sized companies in need of a more forward-looking financial strategy.

We work well with companies that:

- Are private companies
- Have revenues ranging from $3-30M annually
- Need better forecasting
- May require debt or equity financing
- Have no CFO or have an underqualified CFO
- Are growing 20% or more annually
- Are considering an exit within 5 years

PRICING

Typical pricing is $5-20k per month

PLEASE SEND REFERRALS OR INQUIRIES TO:

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