Preferred CFO
The Confidence of Knowing™

For CEO CI Coaches, Clients & Guests

FREE FINANCIAL CONSULTATION

Call 801-804-5800 ext.1 or request at preferredcfo.com/consultation

Cash Flow | Scenario Building | Opportunity Analysis | Survival & Recovery

ABOUT PREFERRED CFO

Preferred CFO is a high-level strategic outsourced CFO firm with a forward-looking approach. We help CEOs create and implement a higher level of forecasting and strategy to accelerate growth, optimize resources, and maximize shareholder value.

CFOs | CONTROLLERS | STRATEGIC ADVISORS

WHY WORK WITH US?

Our "sweet spot" is helping companies optimize resources and strategies, remove obstacles to growth, and maximize profits.

- Invaluable forward-thinking strategy for a clearer, more efficient path to growth.
- Full-service expert financial team to fully integrate into or augment existing teams.
- Seasoned CFOs with prior industry and operating experience.

LET'S TALK: 801-804-5800 x1

OUR SPECIALTIES

Preferred CFO offers high-level CFO services and advisory.

STRATEGY & FORECASTING

- 5-year monthly forecasting (P&L, BS, & CF)
- 12-month rolling forecast
- Actual to budget reporting
- Short-term cash projections

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

www.preferredcfo.com