Preferred CFO
The Confidence of Knowing™

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 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.

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

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