



### **Virtual CFO**

*We Coach, We Advise, We Crunch Numbers*

**Our Virtual CFO service puts a CFO on your team and includes ongoing** hands-on growth strategy, financial reporting, analysis and financial modeling crafted for you - delivered complete and wrapped up like a gift. You'll have the benefit of an experienced CFO who also knows your business to support and lead on strategy, finance and operational decisions. Together we'll build consistently improve the efficiency of your finance & operations and make sure you have confidence in your numbers.

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### **Meaningful Money Courses & Community**

*We Coach, You Run the Numbers*

**Meaningful Money Courses give you expert guidance to** implement templates, worksheets, and tools to confidently conduct your own analysis, build spreadsheets and learn by doing with a CFO as your advisor. Once you've completed the courses, ongoing feedback and support are available in weekly ASK a CFO sessions and in our online community.



**Meaningful Money Essentials Course:** Cash Management PLUS Accurate, useful Financial Reporting



**Meaningful Money Expansion Course:** Dial in a 3-year growth plan/forecast and implement your Key Performance Metrics




















**Meaningful Money Community:** Embracing using Numbers and Decision-making frameworks.

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### **Fast Action Projects**

**Fast Action Projects are short-term intensive projects focused on one pivotal business need** such as financial modeling, capital planning, or cash management & Profit First implementation. An excellent way to get started with hands-on CFO support.

	VIRTUAL CFO	MEANINGFUL MONEY	FAST ACTION PROJECTS
CFO ROLE	TEAM MEMBER	COACH	ANALYST/ADVISOR
ADVISOR & WORK SESSIONS	1:1 WEEKLY	GROUP	1:1
FUNDAMENTALS CHECK-UP			
DESTINATION: ONE-PAGE PLAN			
MAP: FINANCIAL PROJECTIONS & PROFIT PLAN			 <b>CHOOSE ONE</b>
COMPASS: KPI DASHBOARD			
FUEL: CASH MANAGEMENT			
ACTION: OKR & DECISION FRAMEWORKS			
1:1 QUARTERLY PLANNING AND REVIEW		ADD ON	
1:1 MONTHLY FINANCIAL REVIEWS		ADD ON	

### **Bookkeeping**

All CFO services require bookkeeping that is accurate and up to date. Monthly bookkeeping services are available if needed. Pricing for monthly bookkeeping is based on complexity and volume of transactions.

**Upgrades:** Members of Meaningful Money may add Fast Action Projects as needed; or upgrade to full Service CFO for more intensive support.

#### KEY



*We do the work*



*We coach you through the process*