



IMPACT

CFO

**FRACTIONAL CFO SOLUTIONS
TAILORED TO YOUR SUCCESS**

LET'S THINK ABOUT YOUR BUSINESS

- What do you want to do with your business?
- What do you think your business is worth?
- Do your kids want to take over your business?



SUCCESSION SURVIVABILITY



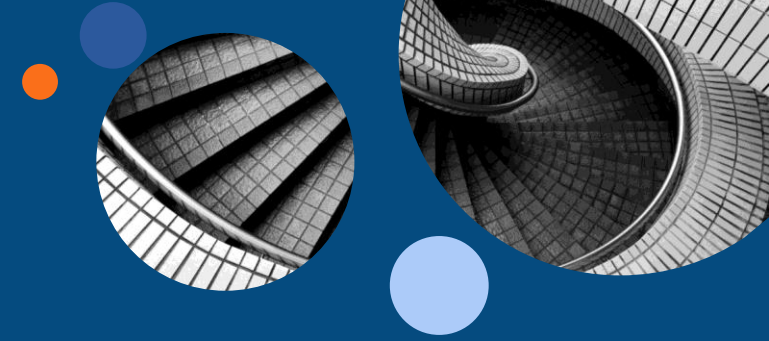
1:3

1st Generation
to
2nd Generation

1:8

2nd Generation
to
3rd Generation

PLANNING EQUALS SUCCESS



EXPERIENCE MATTERS

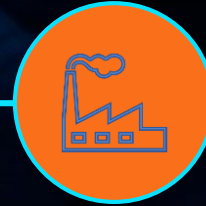
LOWELL MORA
CEO/CFO



EDUCATION



WORK HISTORY



INDUSTRIES



OUTCOMES

RISKS YOU MAY NOT HAVE CONSIDERED

48%

Businesses end up in bankruptcy after death of the owner



Improper borrowing/
leveraging of debt



INTERESTING FACTS

- 81% of business owners handle their financials themselves.
- 32.4% of businesses (or 9 million companies) are run by business owners who are not comfortable with financial information.
- 40% of business owners self-described as "Financially Illiterate"

YOUR OPTIONS

PARTNER WITH A FRACTIONAL CFO

- ✓ Solidify your team
- ✓ Predictable financials
- ✓ Manage risk successfully
- ✓ Understand business metrics into the future
- ✓ More free time to do what you love

BECOME FINANCIALLY COMPETENT

- Invest your time outside of normal operations
- Cost of education - starting at the "bottom"
- Can you implement what you learn without fear

Plan Your Business Succession with Confidence: Free Personalized Plan



Identify where you stand in the transition process



Uncover critical insights to plan your next steps



Receive a Free 13 Week Cash Flow Forecasting Spreadsheet followed by a Free 30-minute working session on Cash Flow

Begin Your
Journey Here!



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