



CFO
ADVISOR GROUP, LLC.

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A SEAT AT YOUR TABLE

"The man who gets the most satisfactory results is not always the man with the most brilliant single mind, but rather the man who can best coordinate the brains and talents of his associates." - Sir William Alton Jones

CFO Advisor Group provides executive level leadership to small and mid-sized enterprises. We get all the brains coordinated on strategic planning, and executing the organization vision and mission. By pulling stakeholders together utilizing strong numbers and leadership skills, along with vision, creativity, innovation and influence, successful paths become forged towards desired outcomes ~ Increased Growth and Profitability.

Small and Medium Size Businesses run lean and have needs for executive acumen and contacts to augment their rapid growth. Having a CFO seated as a management team member is critical to optimize business growth and profitability.

Size and Scope of Fractional CFO Advisor Engagements Vary and Include

Business Planning, Strategies & Development

- ◆ Develop Intellectual Property, Start-up Business Plans and Exit Strategies
- ◆ Prepare Financial Projections, Cost Benefit Reports & Breakeven Analysis
 - ◆ Identify and Develop New Revenue Streams
 - ◆ Capital Raises and Loan Packages

Business Operations and Management Consulting

- ◆ Oversight of Key Contracts, Personnel, Short & Long-term Agendas and Projects
 - ◆ Leadership Mentoring & Teambuilding

Vital Business Relationship Liaison

- ◆ Create Access and Maintain Relationships to Desired Contacts
- ◆ Customers, Vendors, Bankers, Legal, CPA, Investor, etc.

ERP & Accounting System Design, Implementation, Management and Training

- ◆ Aligning Business Processes to Optimize KPI and other Managerial Reports



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Relationships, Relationships, Relationships

CFO Advisor Group has cultivated numerous relationships over the last 20+ years of business. Key partners making up our 'Group' include:

Employee Benefits, Consulting & Payroll

- ◆ Workforce Consultants, LLC
- ◆ PCS - Human Capital Management
- ◆ ADP Payroll Services
- ◆ Cragg Insurance Agency

CPA Firms

- ◆ Walker & Armstrong, LLP
- ◆ Semple, Marchal & Cooper, LLP

Advertising, Marketing & Sales Strategy

- ◆ OH Partners
- ◆ Sportscaster Marketing
- ◆ Sales Xceleration

Information Technology & ERP

- ◆ Computer Technologies
- ◆ IC Security and Technology

Business Insurance & Risk Mitigation

- ◆ USI Business Insurance
- ◆ Horizon Insurance Group

Banking

- ◆ First Internet Bank
- ◆ BBVA Compass Bank
- ◆ CIT Commercial Services

Legal

- ◆ Sorrel Law Firm, PLC
- ◆ Bonnett Fairbourn Friedman & Balint PC
- ◆ Wilenchik & Bartness, PC

Wealth Management

- ◆ Wells Fargo Advisors
- ◆ United Capital Financial Advisers

What CFO Advisor Clients Are Saying

"I would say he [CFO Advisor Group Founder, Chris Casalena] is one of the most talented financial and general business persons I know or have worked with. He is the consummate professional in all of his dealings. A motivator and team player, he is able to drive business ahead with plenty of strategic planning and foresight."

– Don Alhany, President Custom Fab USA, Inc.

"Chris [CFO Advisor Group Founder] is a rare professional with hands-on, leadership skills in the essential functions of Financial (CFO), Operations (COO/GM) and Human Resources. Chris is professional, intelligent and highly skilled." – Greg Wilson, President Workforce Consultants, LLC

Learn more at www.cfoadvisor.net