

Full financial & operational clarity

without hiring a full-time CFO.

I AM CFO turns your QuickBooks data into live financial dashboards — so you see your real numbers every day, week, month, quarter, and year. Clean books, clear P&Ls, and the operational insight to run your business by the numbers.

Real-time

Dashboards synced 24/7 to QuickBooks

120+ hrs

Manual reporting eliminated every year

Bank-ready

Financials lenders and partners trust

THE PROBLEM

Most owners run their business on last month's numbers.

By the time the books close and reports land, the month is already over. Decisions get made on gut feel and a bank balance — not on what's actually driving profit. I AM CFO closes that gap.



Reporting that's always late

P&Ls arrive weeks after month-end. You're steering by looking in the rear-view mirror.



Spreadsheet spaghetti

Hours lost every month stitching exports together — and the numbers still don't reconcile.



No line of sight on cash

You don't know your true cash position, what's owed, or what's coming until it's a problem.



A full-time CFO costs \$200K+

The strategic insight you need is priced for enterprises, not growing small businesses.

The shift: operate like a CFO — at a fraction of the cost.

I AM CFO pairs clean, done-for-you bookkeeping with a live financial command center. Your numbers are always current, always reconciled, and always one click from the detail behind them — so you can make confident decisions in real time, not three weeks late.

Daily

CASH

Weekly

TRENDS

Monthly

P&L

Quarterly

REVIEWS

Annual

PLANNING

WHAT YOU GET

Bookkeeping, reporting, and CFO insight — in one platform.

Everything you need to keep the books clean and see the whole business clearly, built on top of the QuickBooks you already use.

● Done-for-you bookkeeping

Accurate, reconciled, up-to-date books managed for you every month — the reliable foundation everything else is built on.

● Live financial dashboards

Real-time cash flow, P&L, and balance sheet — synced to QuickBooks 24/7, viewable on any device.

● Drill-down to the detail

Go from a top-line number to the vendor, customer, or transaction behind it in a single click.

● Direct CFO-level insights

Continuous analysis flags trends and anomalies — and you get direct CFO-level answers to your questions in plain English.

● Loan- & bank-ready financials

Lender-ready packages for SBA 7(a), 504, conventional loans, and lines of credit when you're ready to grow.

● Operational clarity

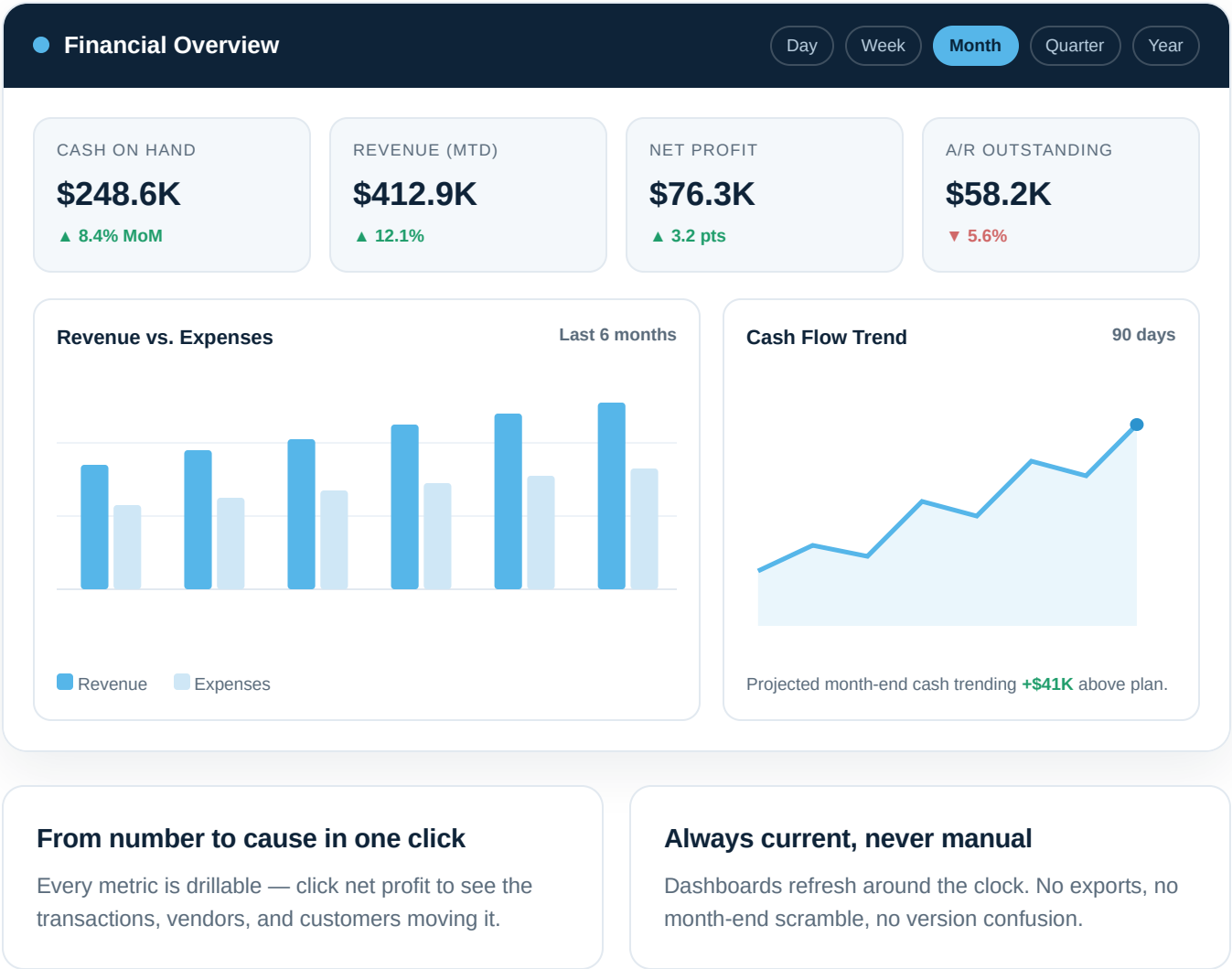
Connect POS, PMS, and other systems to see the operational metrics behind the money — not just the accounting.

Built for your world.

Multi-location businesses, short-term rental operators (Guesty), and talent agencies (payroll & commission reconciliation via Gusto) get purpose-built views — from per-property RevPAR to deal-level margins.

See the whole business at a glance.

A single live view of cash, profit, and performance — updated automatically, no spreadsheets required. Illustrative preview below.



CONNECTED VISIBILITY

One live view of your whole business — with CFO-level insight built in.

I AM CFO connects to the systems you already run on and pulls everything into a single, always-current financial model — then delivers the insight to you automatically. Claude accessibility is built in, so you can ask your numbers a question any time.

 QuickBooks Live GL, P&L & balance sheet	 PDS Logix Production, AR/AP & payroll analytics	 Tulips Talent Deals, commissions & goal tracking	 Guesty Per-property revenue & occupancy
 Gusto Payroll & labor cost	 POS Systems Daily sales & ticket detail	 PMS Platforms Bookings & operational metrics	 Bank & Processors Cash, deposits & fees

CFO

I AM CFO — your numbers, unified.

Every source feeds one always-current model. I AM CFO flags what changed and delivers your daily and weekly reports automatically — with Claude accessibility built in, so you can ask your numbers a question any time and get a straight, CFO-level answer.

8+ yrs

of ledger history synced & reconciled

45

CFO-grade analytics functions

24 hrs

max data latency — refreshed daily

1 place

finance + operations, unified



Now accessible in Claude.

Connect I AM CFO to Claude and ask your numbers anything — your live books, reports, and KPIs, right inside the assistant you already use. **Secure, read-only, always current.**

DAILY & WEEKLY, AUTOMATICALLY

Reports built for how your business actually makes money.

Piecework, per-property, per-service, per-location — I AM CFO compiles the numbers that matter to your business and emails them every day and week. Below is a real daily production report, generated and delivered automatically.

PDS

Production Report

PDS Logix · Daily Summary

AS OF
Aug 24, 2026

YESTERDAY

43 CRS · 188 Photo

THIS WEEK

43 CRS · 188 Photo

THIS MONTH

1,602 CRS · 3,662 Photo

PIECEWORK

Revenue by piece

rev = price × pieces

	YESTERDAY		THIS WEEK		THIS MONTH	
WORKER	PIECES	REV	PIECES	REV	PIECES	REV
M. Rivera Dallas · \$19.50/pc	18	\$351	18	\$351	325	\$6,338
J. Brooks Dallas · \$19.50/pc	17	\$332	17	\$332	446	\$8,697
A. Delgado Dallas · \$19.50/pc	8	\$156	8	\$156	389	\$7,586
T. Coleman Dallas · \$19.50/pc	—	—	—	—	364	\$7,098
R. Santos Atlanta · \$21.00/pc	—	—	—	—	78	\$1,638
TOTALS	43	\$839	43	\$839	1,602	\$31,357

● ASK YOUR NUMBERS ANYTHING — CLAUDE ACCESS, INSIDE I AM CFO

Who were my top producers this month and how's revenue pacing?

Your top three producers drove **\$22.6K** of this month's **\$31,357** in piecework. Revenue is pacing **ahead of last month** at the same point — want me to break it down by location or add the Photo Dept totals?

HOW IT WORKS

Live in days, not months.

1

Connect QuickBooks

Securely link your existing QuickBooks in minutes — plus any POS, PMS, or payroll systems you run on.

2

We clean & structure your books

Our team reconciles and organizes your financials so every report stands on accurate, trustworthy data.

3

Your dashboards go live

Real-time P&L, cash flow, and KPIs — on any device, updated 24/7, with CFO-level insight built in.

4

Ongoing CFO-level guidance

Monthly reporting, drill-downs on demand, and financials that are always bank- and decision-ready.

SIMPLE, TRANSPARENT PLANS

Pick the level of support you want.

ESSENTIAL

\$399/mo

- ✓ Real-time QuickBooks dashboard
- ✓ Live P&L & cash flow
- ✓ Automated 24/7 reporting
- ✓ Email support

MOST POPULAR

PROFESSIONAL

\$699/mo

- ✓ Everything in Essential
- ✓ Multi-location tracking
- ✓ Operational integrations (POS/PMS)
- ✓ CFO-level insights & chat
- ✓ Priority support

WHITE GLOVE

\$999/mo

- ✓ Everything in Professional
- ✓ Hands-on bookkeeping management
- ✓ Loan- & bank-ready packages
- ✓ Dedicated advisor

No long-term contracts — cancel anytime. [Setup fee waived for a limited time.](#)

WHY I AM CFO

The clarity of a CFO. The speed of software.

Real-time, not rear-view

Your numbers are current to the day — decisions get made on what's happening now.

Clean books, guaranteed

Done-for-you bookkeeping means the data behind every dashboard is accurate and reconciled.

Insight in plain English

Direct CFO-level insight on what changed and why — no finance degree required to understand your business.

CFO value, SMB price

Enterprise-grade financial visibility from \$399/mo — a fraction of a full-time hire.

See your real numbers — book a free demo.

In 30 minutes we'll connect a live view of your financials and show you exactly what running your business on real-time data looks like. No obligation, no long-term contract.

[Book Your Free Cash Flow Demo →](#)

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CFO-Level Intelligence for Growing Businesses