



CFO-LEVEL INTELLIGENCE

Accounting, Financial & Operational **clarity** without hiring a full-time CFO.

Your QuickBooks becomes a live financial model — forecast, reconciled, and answerable in plain English. Clean books underneath, a CFO's read on top.



A LOGISTICS CLIENT • CASH ON HAND, AUG-DEC • A REAL FORECAST

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

Three things quietly drain a \$2 million business of about \$71,000 a year. Not one of them shows up as a problem on any report.

\$32,000

Your costs crept up.

Parts, materials, freight, card fees — each goes up a few percent, and every invoice still looks normal.

\$30,000

Work you finished and never billed.

Nothing flags an invoice that was never created. You simply never get paid for the job.

\$9,000

The same report, rebuilt by hand.

A day a month in a spreadsheet, to tell you what you should have seen on Tuesday.

And you find out six weeks late.

February closes in the middle of March. So you quoted jobs, bought stock and made hires on numbers that were already a month old.

Ask in plain English. Get a CFO's answer.

An AI reads the books you already keep, and answers in sentences. Ask it the way you would ask a bookkeeper who knows your business.

Which jobs actually made money last month?

I AM CFO

Nine of your eleven did. The two that did not were both change orders you never billed — **\$11,400** of work. Want me to draft those invoices?

Why is cash tight when sales are up?

I AM CFO

Sales are up **14%** and your customers are paying **nine days slower** than last year. That is **\$38,000** sitting in invoices that are past due, and half of it is with two customers.

Can I afford another truck and a crew?

I AM CFO

Yes, from March. Payments and wages come to **\$7,100** a month; you clear that from June onward, and the tightest week of the year still leaves you **\$22,000**.

It reads your books. It does not change them. Anything that would post to your ledger is written up for you first, and waits until you say yes.

WHAT YOU GET

Your books, your numbers, and someone to ask.

- **Your books, kept**
Reconciled and up to date every month, on the QuickBooks you already use.
- **Numbers you can see today**
Cash, profit, and what each job or location earned — on any device, not at month end.
- **Answers in plain English**
Ask the questions on the page before. The answer comes out of your own ledger.
- **The checks nobody runs by hand**
Work never invoiced, bills paid twice, tax collected and not recorded — found and fixed.

Works with QuickBooks, Xero, Gusto, your POS and your bank.

SIMPLE, TRANSPARENT PLANS

Pick the level of support you want.

ESSENTIAL	MOST POPULAR	WHITE GLOVE
\$399 /mo	\$699 /mo	\$999 /mo
› Your books, kept › Live cash & profit	› Everything in Essential › Ask your numbers, in plain English › Job and location profit	› Everything in Professional › We do the bookkeeping › Loan- & bank-ready packages

No long-term contracts — cancel anytime. **Setup fee waived for a limited time.**

See your real numbers — book a free demo.

In 15 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.

CALL
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