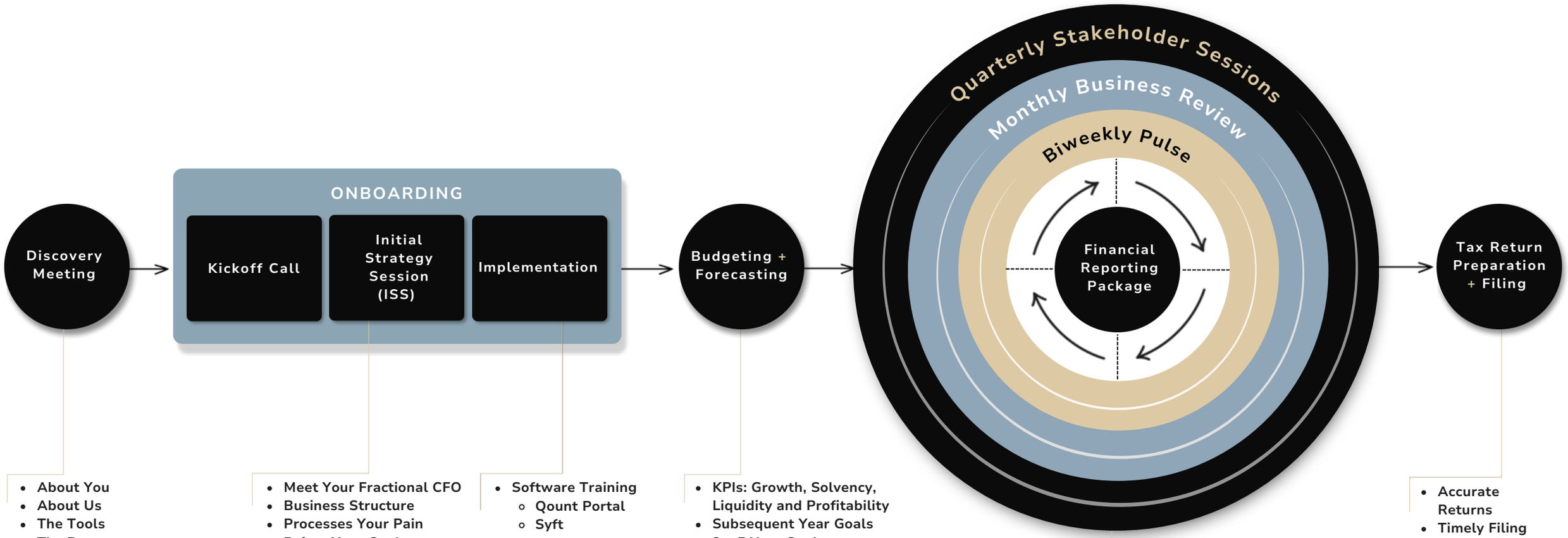
KAIZEN
CPAs + ADVISORS

THE KAIZEN DIFFERENCE



- About You
- About Us
- The Tools
- The Process
- What You Can Expect

- Meet Your Fractional CFO
- Business Structure
- Processes Your Pain
- Points Your Goals
- How We'll Help

- Software Training
  - Qount Portal
  - Syft
- QBO Review + Cleanup

- KPIs: Growth, Solvency, Liquidity and Profitability
- Subsequent Year Goals
- 3 + 5 Year Goals

- Statement of Assets, Liabilities, and Equity
- Statement of Revenue and Expenses
- Statement of Cashflows and Budget
- KPIs
- Mthly + Qtly Executive Summaries
- Monitor and Analyze Budget Variances
- Pulse: “Touch Base” Discussion
- Business Review: Discuss Current Month Financial Statements
- Stakeholder Session: Review Qtly Financial Reporting Package

- Accurate Returns
- Timely Filing
- No Surprises

FRACTIONAL CFO