



The financial oversight most businesses don't get from a traditional bookkeeper or accountant.

We handle the accounting and bookkeeping day to day, and add the financial leadership that helps you decide what to do with the numbers.

We don't just record what happened. We help you understand the numbers and use them to make better decisions.

THREE WAYS TO WORK WITH US

Financial Assessment From \$2,500 one time

A deep review of your financials that finds missed profitability, unnecessary expenses, and cash flow opportunities.

- **Foundational** \$2,500
- **Strategic** \$5,000
- **Executive** \$10,000

Fractional CFO From \$3,000 per month

Direct access to a former CFO, not a rotating team. Every service is included under one engagement.

- Foundational Assessment included
- Bookkeeping and reporting
- No minimum term, cancel with 30 days' notice

Bookkeeping & Advisory No retainer as needed

Targeted help with no minimum commitment.

- **Books Cleanup** \$150/hr
- **Budget Builder** \$250/hr
- **Monthly Bookkeeping** \$1,000/mo, QuickBooks Online included

WHAT WE HANDLE

- Bookkeeping and reconciliations
- Accounts payable and receivable
- Monthly financial statements
- Cash flow and profitability analysis
- Reporting and forecasting
- CFO-level strategic planning
- Tax planning with our CPAs

WHO WE WORK WITH

Start-Ups

SaaS Companies

Non-Profits

Financial Services

RIAs & Wealth Managers

Musicians & Artists

YOUR TEAM

Former CFO

USC Marshall MBA

CFP® PROFESSIONAL on staff

CPA on staff

QuickBooks Certified

Start with a free 15-minute conversation.

Tell us how you handle your accounting today and where you want more visibility. The first call is short and free.

TrueInsights CFO, LLC · (818) 489-7628 · trueinsightscfo.com



SCAN TO VISIT OUR SITE