



## Virtual CFO Services - Fates, Bodily, & Parker

Fates, Bodily, & Parker is leveling the playing field for small and medium-sized businesses with our specialized CFO Services.

Today, 82% of businesses that don't make it say poor cash flow management was a driving factor.\* Without a full-time CFO, we see too many companies asking themselves following questions:

- Am I spending too much time on managing financials, rather than planning and executing our growth strategy?
- Can I trust my financial data and use it to make decisions about key investments?
- Do I have a real-time understanding of our cash position?
- Is there a new ERP or accounting software that can help my business and do we have the expertise to implement a new system?

We immediately take these burdens off your shoulders with our team lead by:



**Tyler Fates**

- Assurance services
- Not for profit - audit and tax
- International tax
- Governmental work
- Tax planning
- Organizational efficiency - i.e. faster monthly closes



**Layne Bodily**

- Budgeting/cash flow
- Profitability analysis
- Strategic goal planning and tracking
- Organizational efficiency - i.e. faster monthly closes
- ERP implementations
- Due diligence - sell side
- Tax planning



**Tom Parker**

- Restructuring analysis
- Gift/estate planning
- State and local tax (SALT) guidance
- Budgeting / cash flow
- Due diligence - sell side
- Relationship management - insurance, attorneys, bankers, etc.
- Tax planning

With CFO Services from Fates, Bodily, & Parker, you get to leverage the diverse expertise and experience of our entire leadership team.

\*SCORE/Counselors to America's Small Business



## Support beyond the numbers

Our CFO team provides more than just the financial strategies to enable your growth; we evaluate your business holistically and provide you with access to our network of strategic partners that provide:

- Online marketing support
- Specialty website design
- Automation software
- Technology consulting
- Attorney partnerships
- Insurance and banking relationships and guidance

## We'll help you define the best financial services to support your business

	Foundational	Strategic	Comprehensive
Tax filings - entity and individual	✓	✓	✓
Entity Structure Review	✓	✓	✓
Retirement Planning Assistance	✓	✓	✓
Budgeting		✓	✓
Assistance with Debt Planning		✓	✓
Asset Purchase Profitability Analysis		✓	✓
Annual Meeting	✓	✓	✓
Quarterly Meetings		✓	✓
Monthly Meetings			✓
Key Performance Indicators			✓
Cash Flow Forecasting			✓
Distribution Planning			✓
Succession Planning			✓
Annual Financials	✓		✓
Quarterly Financials		✓	✓
Month end close/Monthly Financials			✓

## Contact us today

to discuss advice driven financial services tailored to your needs