

Fractional CFO

**Let us focus on your financials
so you're free to focus on your
RIA business.**



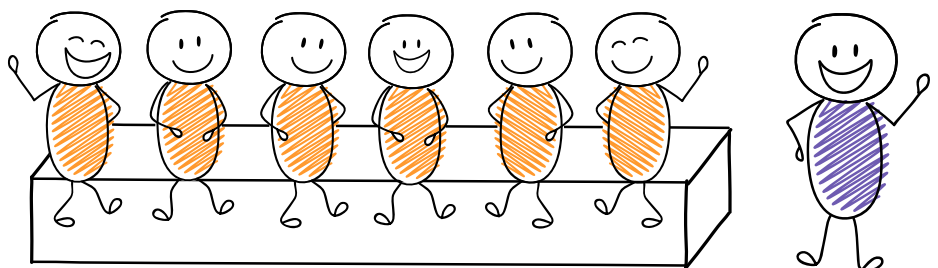
How could a fractional CFO benefit your firm?

When serving clients is your top priority, it can be difficult to keep up with your firm's financial and accounting needs. This is where Elevate can help. We provide you with a dedicated CFO team consisting of accountants, CPAs, advisors, and tax professionals. In addition to managing your firm's financials, we provide you with a daily snapshot of your firm's financial health. We also keep your RIA firm up to date with all applicable accounting and reporting requirements, removing this persistent worry from your plate.

*As your fractional CFO, we bring the same value
to your firm as you bring to your clients!*

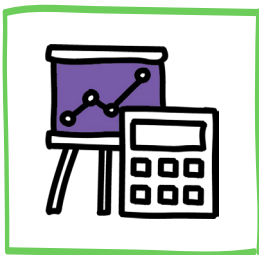
We have a deep
team bench.

Elevate CPA Group has a
team of CPAs, advisors, and
accountants that focus solely on
the financial services industry.

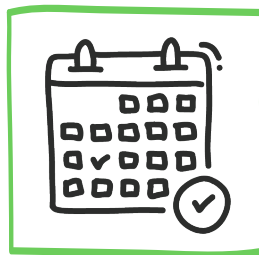


The Elevate fractional CFO advantage

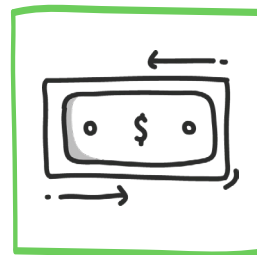
Hiring a full-time CFO can come at a significant cost – typically over \$250,000 annually. A fractional CFO, sometimes referred to as a virtual CFO, is an affordable way for your RIA firm to get all the benefits of an in-house CFO. By providing you with a “fractional CFO team,” Elevate broadens the traditional role of a CFO. In addition to typical accounting services – such as bookkeeping and forecasting, controller and in-house tax expert to name a few– Elevate supports you with proactive financial guidance and specialized expertise. Our fractional CFO service includes:



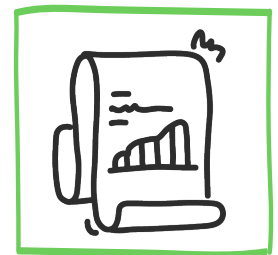
Tax Planning



Accounting + Tax Return Preparation



Cash Flow Planning and Projections



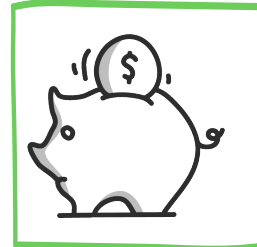
Annual Business Valuation



Managed Fee Calculation Review



Industry Benchmarking



Compensation Planning



Personal Financial Statements

Focus on what matters to you

The day-to-day accounting and financial tasks required to run an RIA business can easily become overwhelming. As your in-house financial and tax expert, we help you check these tasks off your list for good. With fewer worries and more time, you're empowered to do more of the work that really matters.

Schedule your
free consultation!



✉ info@elevatecpagroup.com

☎ 303-444-9264

🌐 elevatecpagroup.com