

## PEOPLE-FIRST ADVISORY

# Strategic Finance for Growth Companies

We build enduring companies through the power of strategic **people**, effective **processes**, and trusted **partnerships**.

## The SPF Thesis

Every transformative company is built on a foundation of exceptional personnel, rigorous processes, and trusted partnerships. In an accelerating age of automation and AI, we don't just layer tools onto a business—we start within the roots of your company's operations, leading teams beyond the limitations of traditional accounting.

## ARCHITECTURAL AUTHORITY

### The 3P Engine

**Processes:** Streamlined workflows

**Policies:** Governance frameworks

**Procedures:** Execution protocols

*The operational backbone of enduring companies.*

## CLOUD-BASED WORKFLOWS

### The Tech Stack

StrategyPlus Finance partners with the industry's most secure, cloud-based platforms to ensure your financial operations are automated, accurate, and ready to scale.

*The 3P Engine is accelerated by the company's cloud-based workflows.*

## TRUSTED RELATIONSHIPS

### The Network

A curated network of best-in-class service partners who share our values and commitment to excellence.

*Elite adjuncts extend reach and expertise, increasing service value in your client experience.*

**50+**

COMPANIES ADVISED

**15+**

YEARS OF IMPACT

**25+**

STRATEGIC PARTNERS

**98%**

CLIENT RETENTION

## Who We Serve

Growth-minded leaders seeking services from a strategic partner for:

- **The Foundational Layer:** Bookkeeping & Accounting Operations
- **The Control Layer:** Financial Reporting & Financial Planning and Analysis (FP&A)
- **The Strategic Layer:** Financial Leadership (CFO Services) & Advisory
- **M&A and Co-Op Initiatives:** Regional accounting and service firms with \$1 million to \$25 million in revenue

## Ready to build your plan?

Every transformative partnership starts with a single conversation.

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