

**STRATEGYPLUS FINANCE**

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***People-First***  
**Strategic Finance**  
**for Growth Companies**

**Michael DeBoard, CPA, MBA**

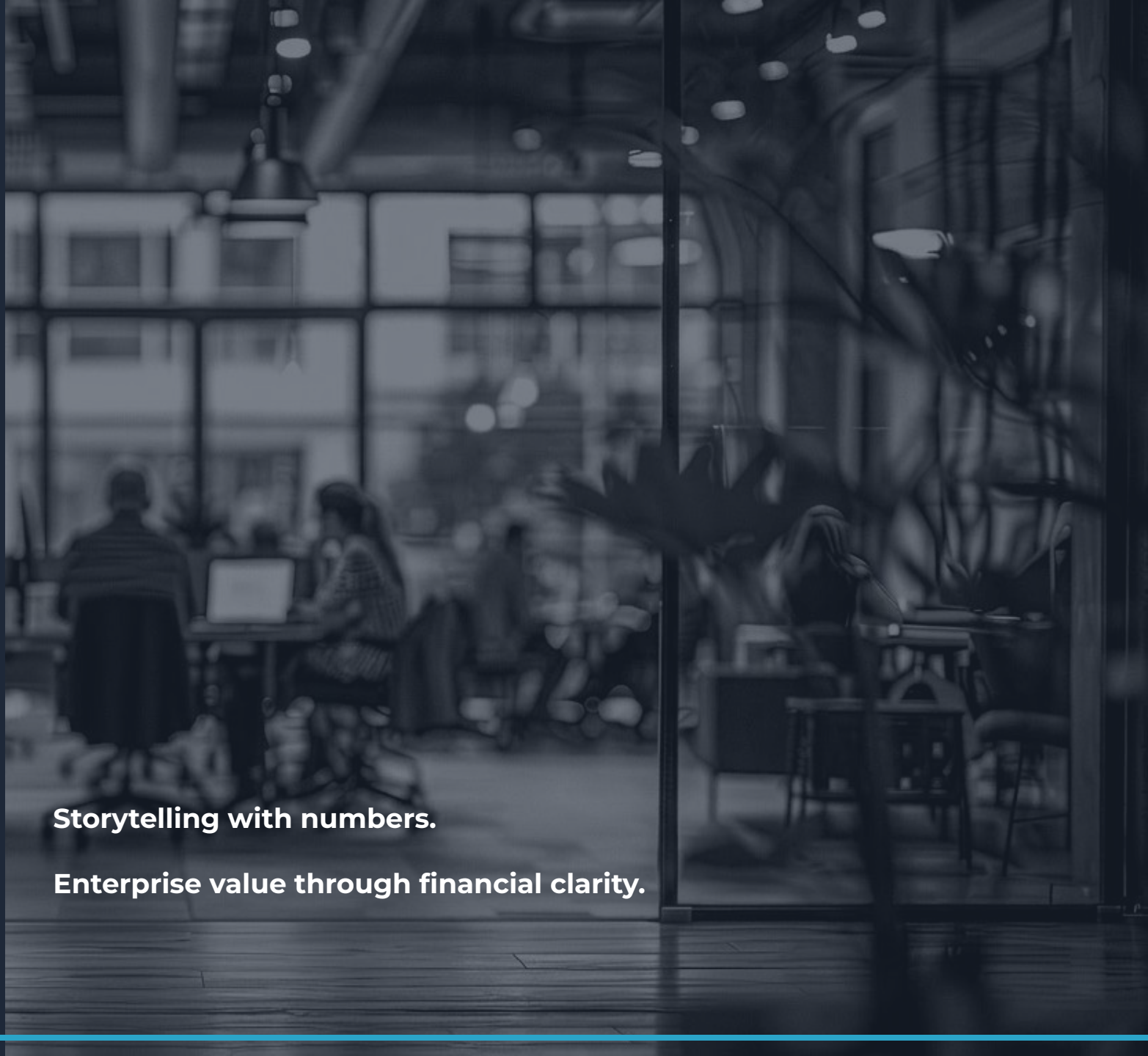
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**Storytelling with numbers.**

**Enterprise value through financial clarity.**



# Building Enduring Companies

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.

## PEOPLE

Strategic personnel who drive transformation

## PROCESSES

Rigorous systems that professionalize operations

## PARTNERSHIPS

Trusted alliances that extend reach & expertise

**50+**

Companies  
Advised

**15+**

Years of  
Impact

**25+**

Strategic  
Partners

**98%**

Client  
Retention

# The 3P Engine to Power Your Financial Engine

The operational backbone of enduring companies — professionalizing and streamlining operations to achieve financial strategy successfully.

1

## PROCESS

*Streamlined Workflows*

- End-to-end workflow design
- Automation of recurring tasks
- Scalable operational frameworks
- Data-driven decision systems

2

## POLICY

*Governance Frameworks*

- Internal controls & compliance
- Risk management protocols
- Financial governance standards
- Regulatory alignment

3

## PROCEDURE

*Execution Protocols*

- Standard operating procedures
- Quality assurance checkpoints
- Team accountability structures
- Continuous improvement cycles

# The Tech Stack Supporting Your Financial Engine

The 3P Engine is accelerated by best-in-class, cloud-based platforms ensuring your financial operations are automated, accurate, and ready to scale.



## SPEND MANAGEMENT

### Ramp

Corporate card & expense automation. Real-time visibility into spend with automated controls.



## PAYROLL & HR

### Gusto

Full-service payroll, benefits, and HR compliance. Streamlined people operations.



## ACCOUNTING & REPORTING ENGINE

### QuickBooks Online

Cloud-native general ledger. The backbone of financial reporting and close processes.



## REVOPS & AR AUTOMATION

### JustPaid.ai

AI-powered accounts payable. Automated invoice processing and payment workflows.

**Your Competitive Advantage:** Financial operations that are automated, accurate, and ready to scale.

# The Partnership Network

We have curated a 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.

## Legal & Compliance

Corporate counsel, regulatory guidance, and entity structuring

## Tax Strategy

Federal and state tax planning, credits, and compliance optimization

## HR & Talent

Recruiting, payroll administration, and benefits management

## Insurance & Risk

Business insurance, liability protection, and risk mitigation

## Technology & Systems

IT infrastructure, cybersecurity, and systems integration

## Banking & Capital

Lending relationships, treasury management, and growth financing

# The Service Layers

StrategyPlus Finance in as **industry agnostic partner** serving **growth-minded business leaders** across the **greater US** as well as **regional accounting and service firms** (\$1M – \$25M in revenue) **seeking a strategic partner.**

## THE FOUNDATIONAL LAYER

### Bookkeeping & Accounting Operations

Clean books. Reliable data. The operational bedrock upon which all financial strategy is built.

## THE CONTROL LAYER

### Financial Reporting & FP&A

Actionable reporting, budgeting, and forecasting that transform numbers into strategic narratives.

## THE STRATEGIC LAYER

### CFO Services & Advisory

Executive-level financial leadership. Board-ready insights. Capital structure optimization.

## M&A & CO-OP INITIATIVES

### Growth & Transaction Advisory

Acquisition strategy, due diligence, and cooperative partnership structures for accelerated growth.



THE WILL TO WIN

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# Why StrategyPlus Finance

- Big 4 accounting firm rigor meets **startup agility**
- **Full-stack financial services** under one roof
- **Cloud-native operations** from day one
- Curated partner ecosystem **amplifies your capabilities**
- People-first philosophy that **prioritizes your team's growth**

50+

Companies  
Advised

15+

Years of Impact

98%

Client Retention

## Ready to Build Your Plan?

Every transformative partnership starts with a single conversation.



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