

CFO as a service (CFOaaS)

SolomonEdwards' Transaction & Regulatory Advisory Services (TRAS) practice provides accounting and finance advisory services surrounding the full lifecycle of a deal for private equity firms and their portfolio companies. Within TRAS lies SolomonEdwards' CFO as a service (CFOaaS), which helps organizations accomplish goals beyond their bandwidth or expertise. Our CFOaaS includes fractional and interim CFOs tailored to our clients' specific situations.

Fractional CFO



The CFO role continues to be critical to the success of a private equity firm's investment. Our fractional CFO service enables organizations to purchase a block of hours for the future and call upon that CFO when the need arises. It is tailored to your specific situation, enabling you to get the support when you need it most and covers services that include:

- Quarterly board meetings and the need to help build out the board package and talking points.
- Financial reporting packages for management or boards.
- Pending acquisition and expertise around due diligence and/or QOE reports.
- Supporting complex transactions related to M&A activity – acquisitions and integrations.
- Strategies for corporate growth and/or modeling potential downside risk.

Interim CFO Services



Our interim CFO professionals have the expertise to work as CFOs, Vice Presidents of Finance, Controllers, and other key financial positions to address the current situation in any stage of a portfolio company's growth or decline. They have the breadth and depth of experience to quickly learn a company's operations and support any situation, including:

- Ensuring that the accounting and finance department's processes are working efficiently and effectively—whether it pertains to the close or a specific cycle, such as cash collections or revenue recognition.
- Managing change when going through a restructuring due to a merger or acquisition.
- Replacing the current CFO who has or is departing the organization.
- Current CFO's lack of expertise handling rapid growth or industry's dynamic changes.

About SolomonEdwards

SolomonEdwards is a privately held, national professional services firm focused on strategy execution. Operating from strategically located U.S. markets, we serve domestic and multinational clients.

Our TRAS practice supports private equity firms and their portfolio company management teams through the various stages of a deal by working closely to help meet their strategic investment objectives. Our experienced and knowledgeable CFOs provide support with pre-transaction work, deal execution, investment hold period reporting and assistance through the exiting process. Depending on the nature of the project, fees are structured to provide a cost-effective solution to your business. We are always sensitive and flexible to each of our clients' unique circumstances and needs.



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