

FOUNDATION CFO

Recommended annual revenue: no minimum

Investment: \$595/month

INCLUDED SERVICES

Staff Support:

Monthly Financial Review and Strategy meetings
with a Clara CFO

Communication:

Monthly Zoom Meeting
Email Support

Software, Tools and Perks:

CFO Toolkit for self-service financial analysis (see below)
Float Cash Forecasting Software
Receipt Management Software
Wholesale Discounts on accounting-related software

Discounted hourly rate available for:

Special Projects

Add-on Services available:

Bookkeeping, Customized dashboard reporting, Tax Returns,
Reasonable compensation reports (S-corps), Valuation services,
Accounting system migration, Customized policy and procedures manuals

CFO Toolkit

Decision Support Worksheets (i.e. Cash Flow, Cost to Hire, etc.)
Calculators (i.e. ROI, Take home pay, etc.)
Document retention policies
Tax guidelines and deadlines
Links to recommended books and software
Software discount codes

