

About Pointguard Financial, PLLC

Innovative CFO/CPA Solutions

We understand what drives profitability. Our turnkey approach is effective and efficient, working monthly with the business owner and the internal accountant to transform information into **Business Intelligence** that maximizes profits. Regardless of the industry, our **proprietary** formula will work for you as it has for dozens of companies.

- We are a CPA firm specializing in **Outsourced Chief Financial Officer** (CFO) services with tax advisory and preparation services.
- Think of us as your **business partner**. Our proprietary system and financial tools provide strategic direction, and promote follow-through and accountability.
- Our focus is **Operational Finance**. We understand your **Profit Model**, and know how to positively impact it to improve profitability.
- Deep **expertise**, trained CPAs with 25+ years in public/private industry; including executive level experience.
- Our clients are **privately-held** businesses, \$1m-\$20m in revenue who desire to grow, increase profits, or halt operating losses.

SELECTED OUTSOURCED CFO SERVICES INCLUDE:

- Development of your **Profit Model**, identifying drivers of profitability
- **Business Intelligence Dashboard** with key operating metrics
- Financial statement trend analysis and peer comparison
- Financial statement forecasts and projections modeling
- Liaison with banking, legal, and wealth management professionals
- Financial statement and tax planning and preparation
- Assistance with buying and selling your business
- Employee performance and metrics-driven evaluation



INDUSTRIES:

- Professional services
- Healthcare
- Manufacturing
- Wholesale distribution
- Agriculture
- Retail
- Contractors