



What is a Fractional CFO?

A Fractional Chief Financial Officer (CFO) is an individual with CFO experience who can guide organizations to achieve their strategic goals and strengthen their financial position. They provide expertise and a unique lens that does not exist inside the organization, at a fraction of the cost.



1

Financial Structure
Chart of Accounts
Process and Controls
Reconciliations & Cleanup

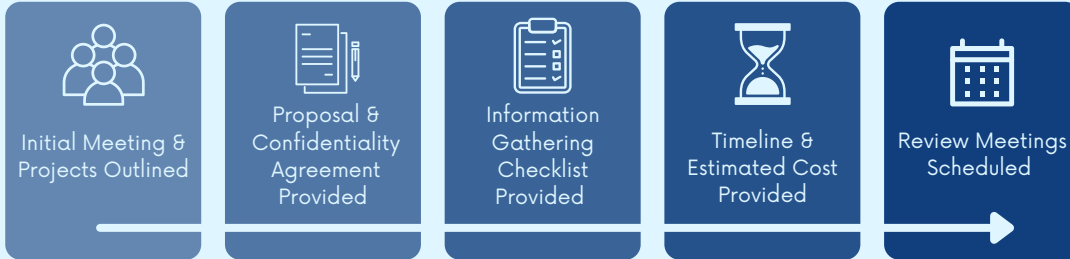
2

Business Planning
Projection – Translate Goals into a Plan
Financial Statement Review
Allocation of Resources – Benchmarks

3

Growth & Investment
Acquisition Evaluation & Integration
Pathway to Ownership
Perpetuation Planning
Compensation Plans

What Does the Process Look Like?



Who Does the Work?

Carey Wallace, the founder of AgencyFocus, an independent insurance agency consulting organization. She has worked in the insurance industry for the last 15 years and with entrepreneurial small businesses for her entire career. During that time, she developed key business consulting services to ensure that agencies have the information and support they need to plan for their agency and successfully perpetuate to the next generation. Carey has worked with hundreds of agencies to help them understand their agency's value and plan for the future. Her education is from West Virginia University with a BS in Finance & Business Administration and she is a Certified Exit Planning Advisor (CEPA).

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What is the Cost?

\$3,500 onboarding
\$2,000 quarterly
retainer