

# Virtual CFO, Controller, Accountant, and Consultant

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## Service Packages

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**KROZEL** CAPITAL  
*Taxes • Investments • Financial Planning*

# Virtual CFO

## Primary Objective:

A CFO develops financial strategy and planning, protects business assets, and communicates value and risk to investors, stakeholders, and the board. They ensure your company is forward-thinking and financially secure. Engaging with a Virtual CFO provides you with access to top-tier financial experts with a wide range of experience at a fraction of the cost. We help you create strategic plans for their future, enabling your organization to maintain sustainable growth and a competitive edge.

*Recommended for growing and mature businesses with annual revenue in excess of \$10 million*

## Example of Services:

- Business Plan Creation and Initial Financing Budget
- One- to Three-Year Forecasting Models and Analysis, Cash Flow Forecasting
- Revenue Models for Start-Up, Growth, or Maturation Phase
- Marketing Strategy Canvas, Customer Segment Review, Cost Structure Analysis
- Thriving Entrepreneur Scorecard, IBISWorld® Report, Industry Analysis
- Strategic Planning and Focus Sessions
- Plus Services listed in Virtual Controller Package

## Timeline Expectations:

Onboarding generally takes two or three months to establish account access, learn your business model, identify and create efficiencies within your structure, meet your team, align with your board, investors, and existing executives, etc. You will receive 20 hours of dedicated service from our team each month. Your account will have priority handling, allowing our team to focus on your account. We will set a specific day of the week for meetings, and a deliverable timeline during onboarding. Weekly meetings are crucial as they help the company adapt to changes in the market.



**Monthly Rate for Services:**  
\$3,750+

# Virtual Controller

## Primary Objective:

A Controller assists a company with complying with financial regulations, overseeing accounting and financial reporting, and helping management minimize expenses and maximize profits. They create the foundation of a sound financial management system within a business. By ensuring reliable data exists in the financials, our Controllers work with your current accounting team to maintain the financial integrity of your company. Contracting with our Virtual Controllers allows your company to make better business decisions because you are more informed and have a clearer picture of your organization's financial status.

*Recommended for growing businesses with annual revenue between \$1 million - \$10 million*

## Example of Services:

- Annual Budgeting + Budget-to-Actual Reporting and Modeling
- KPI Metric Tracking, Custom and Industry-Standard
- Process Improvements and Implementation of Financial Efficiencies
- Training and Educating Accounting Teams on Proper Presentation
- Thriving Entrepreneur Scorecard Creation
- Plus Services listed in Virtual Accountant Package

## Timeline Expectations:

Onboarding generally takes two months to establish account access, learn your business model, identify and create efficiencies within your structure, etc. You will receive 14 hours of dedicated service from our team each month. We will set a specific day of the week for bi-weekly meetings, and a deliverable timeline during onboarding. Meeting twice per month allows our teams to maintain open communication and ensures your financials are more up-to-date than on a monthly basis.



**Monthly Rate for Services:**  
\$2,500+

# Virtual Accountant

## Primary Objective:

An Accountant prepares financial records, identifies areas of risk, and provides financial insight and analysis for businesses. They handle a company's detailed financial transactions, maintain records, and ensure compliance with financial standards. As a Virtual Accountant, we deliver these accounting services from a distance, utilizing your online platforms to prepare your financial statements. This includes tasks such as general ledger and transaction entry, reconciling of accounts, and supporting your Controller, CFO, and/or CEO. We perform all the roles of a traditional accountant while working remotely, yet accessible to you via digital communication and online tools.

*Recommended for startups and small organizations with annual or expected revenue between \$100,000 - \$1 million*

## Example of Services:

- Enter and Track Financial Transactions
- Identify Discrepancies and Maintain Balanced Ledgers
- Month End Reconciliation of Accounts + Closing of Books
- Financial Statement Creation
- Communicate with the Controller, CFO, and/or CEO

## Timeline Expectations:

Onboarding generally takes one month to establish account access, learn your business model, etc. You will receive 11 hours of dedicated service from our team each month. We will set a specific day of the month for meetings, and an estimated deliverable timeline during onboarding. We may determine that clean-up work needs to be performed before delivering the first set of financials. We will communicate that information as soon as possible to reset expectations accordingly.



## Monthly Rate for Services:

\$1,875+

# Virtual Consultant

## Primary Objective:

A Business Consultant can provide valuable insights and strategies to help organizations navigate complex challenges and optimize operations. With expertise in various domains, such as finance, management, and technology, our consultants tailor their advice to meet your unique needs. We work collaboratively with you to identify opportunities for growth, streamline processes, and enhance overall efficiency. By leveraging data-driven analysis and industry best practices, our business consultants empower you to achieve your objectives and sustain long-term success.

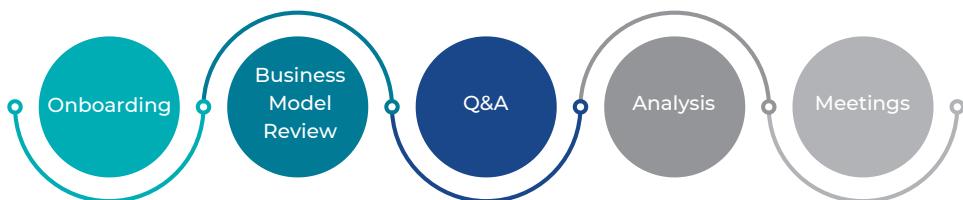
*Recommended for organizations who need assistance and advice without the monthly commitment*

## Example of Services:

- Strategic planning and development
- Financial analysis and budgeting assistance
- Market research and competitive analysis
- Business process improvement
- Change management support
- Risk management and compliance guidance
- Organizational development and team building

## Timeline Expectations:

The onboarding process with our hourly business consultants can vary based on your specific needs and circumstances. It may take some time to familiarize ourselves with your business model. We can schedule regular meetings and outline a preliminary timeline for deliverables, if necessary.



**Blended Hourly Rate for Services:**  
\$275+

# Plan Comparison

Services	vAccountant (reactive)	vController (proactive)	vCFO (strategic)
Client Portal + Digital Tools + Virtual Conferencing	✓	✓	✓
Annual Planning Meeting to Discuss Your Goals for 2025	✓	✓	✓
Month End Reconciliation and Close + Financial Statement Reports	✓	✓	✓
Video Reviews + Live Meetings to Discuss the Financial Health of Your Business	Monthly	Bi-Weekly	Weekly
Dedicated Monthly Hours to Your Account	11	14	20
Annual Budgeting + Budget-to-Actual Reporting		✓	✓
Forecasting + Analysis		12 Months	3-5 Years
Additional Time for Business Consulting and Advisory		✓	✓
Thriving Entrepreneur Scorecard + IBISWorld® Industry Report + Analysis		✓	✓
Exclusive Services Listed in vCFO Package			✓
Priority Service + Collaboration with your Tax, Investment, and Legal Advisors			✓
Estimated Pricing for Service Tier	\$1,875+ per Month	\$2,500+ per Month	\$3,750+ per Month

# Add-On Services

Need extra help but don't want to jump to the next tier?  
Add these services to your package.

Services	Fees
Quick Question Sessions (Ask Anything!)	\$250 per Session
Additional Time for QuickBooks® Accounting Services	\$225 per Hour
Annual Budgeting + Budget-to-Actual Reporting	\$275 per Hour
Forecasting + Analysis (12 month, 3 years or 5 year Model)	\$275 per Hour
Additional Time for Business Consulting and Advisory	\$315 per Hour
Priority Service	\$1,000+
Thriving Entrepreneur Scorecard + IBISWorld® Industry Report and Analysis	Quotes Available
Income Tax Compliance Services	Quotes Available