CFOx®

CFO | Transaction | Accounting

CFO, Transaction, & Accounting Services

BUILT FOR SCALE IN THE MIDDLE MARKET

Updated | Q2-26

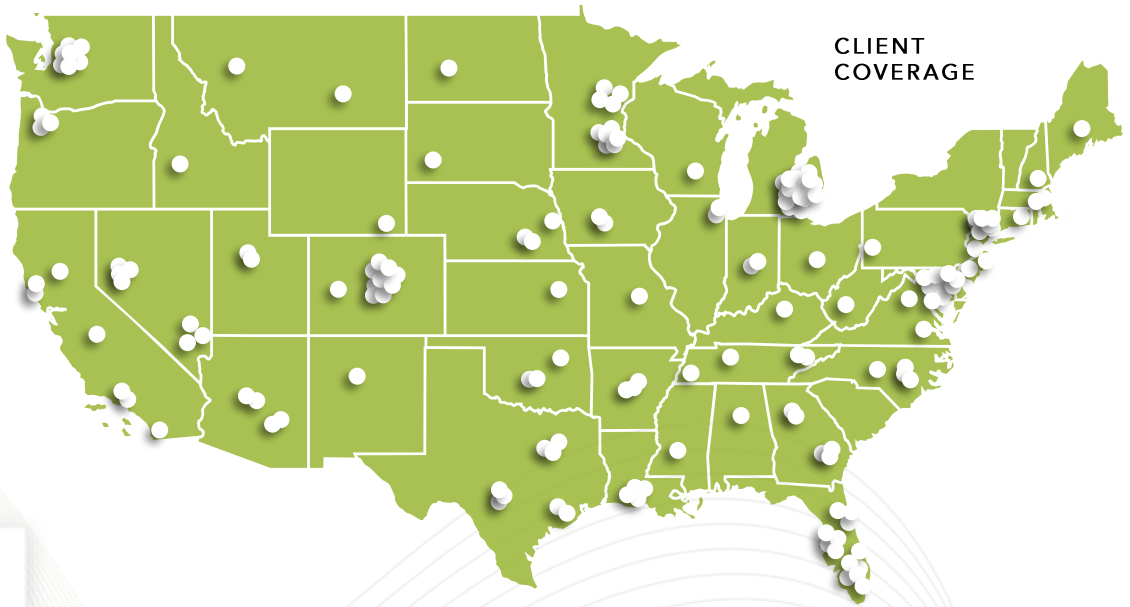
Qualifications & Capabilities

CFO | Transaction | Accounting

Big 4-trained. Boutique focus.

CFOx partners with private equity sponsors, portfolio companies, and founder-led businesses across diligence, closing, and post-close finance execution, while also operating independently of transactions as an outsourced or embedded finance function.

The firm provides CFO and accounting support to drive financial oversight, execution, and scalability, alongside Quality of Earnings (QoE) and related financial diligence services.



CLIENT PROFILE & SCALE

$5-250M	$1-50M
Revenue	EBITDA

NATIONAL REACH

250+	75+	25+	30+
Private Companies	Private Equity Clients	Industries Served	Professionals

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One Firm for M&A and Financial Leadership

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Building scalable, institutional-grade finance operations — from M&A transactions to daily leadership.

TRANSACTION SERVICES

Deal Execution.

Quality of Earnings (QoE)

- Quantify sustainable EBITDA and identify valuation risks impacting price, structure, and performance.

Transaction Readiness

- Prepare financials for diligence and manage working capital & closing mechanics to ensure a credible, defensible process.

Financial Modeling

- Build models to evaluate structure, returns, and sensitivity across scenarios.

POST-CLOSE EXECUTION

First 100 Days.

Opening Balance Sheet

- Build GAAP-aligned opening balance sheet and establish a baseline for post-close reporting.

NWC & Closing Mechanics

- Execute NWC true-ups and closing adjustments aligned with purchase agreement terms.

Integration & Transition

- Stabilize finance across systems and teams; execute a 100-day plan to ensure continuity.

CFO & ACCOUNTING

Ongoing Leadership.

Fractional & Interim Leadership

- Lead CFO, Controller, and FP&A functions to maintain momentum during team build-out.

FP&A & Reporting Infrastructure

- Deliver board-ready reporting, forecasting, and KPIs that enable faster, higher-quality decisions.

Finance & Accounting Ops

- Build scalable close, controls, and cash management to support growth, add-ons, and capital complexity.

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When Clients Bring Us In

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LEADERSHIP & BANDWIDTH GAPS

- CFO departure or leadership gap requiring fractional or interim coverage
- Lean finance team without capacity for operational or strategic demands
- Finance structure no longer aligned with current scale or complexity

SYSTEMS & ACCURACY ISSUES

- Systems transitions or integrations creating strain and data reliability issues
- Accounting cleanup needed to move from cash → accrual (GAAP)
- Financial reporting inaccurate or delayed, reducing confidence and clarity

REPORTING & OPERATIONAL READINESS

- Limited visibility into performance; reporting not timely or actionable
- FP&A, forecasting, and budgeting requiring more structure and rigor
- Cash management and daily operations needing stronger controls

STRATEGIC & TRANSACTION SUPPORT

- M&A, diligence, or integration requiring experienced financial leadership
- Scaling finance to support growth, new services, or institutional ownership
- Strategic CFO partnership to advance priorities and key initiatives

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Trusted by Sponsors, Operators, & Founders

CFOx
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stellex CAPITAL MANAGEMENT

BLUEJAY CAPITAL

tcg THE CHERNIN GROUP

ALIGN CAPITAL PARTNERS

GRAHAM PARTNERS

BOLT VENTURES

BØWRIVER CAPITAL

COPLEY | EQUITY | PARTNERS

US

HOMETOWN VETERINARY PARTNERS

ARROWHEAD CONTRACTING

Golden Steps ABA

Royal Flush TOILET & FENCE

HIGHBAR PHYSICAL THERAPY

Granite COMFORT

Alloy

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