

Accurate accounting. Actionable insights.

Take the next step in growing and institutionalizing your business through accurate and actionable accounting & financial insights. Avoid stressful surprises and improve your daily decision making, leading to revenue growth, cost reduction, cash flow improvement and minimized taxation.

- ▶ Benefit from customized easy-to-use dashboards that give you the confidence to make decisions with conviction.
- ▶ Our team partners with you to create solutions for your business's unique finance and accounting needs. Spend less time worrying about accounting and more time growing your business.

Institutional Quality Advice

We bring significant experience and a proven track record of execution to passionate owners seeking to take their business to the next level.

Bookkeeping

- ◆ Timely, accurate monthly balance sheet, income statement, cash flow statement
- ◆ Foundation for business planning

Business Intelligence

- ◆ Liquidity planning
- ◆ Cash forecasting
- ◆ Budgeting
- ◆ Revenue portioning, product / service profit margin profiles

Capital Markets

- ◆ Bank loan application prep
- ◆ Equity financing prep
- ◆ M&A

TEAM LEADERSHIP EXPERIENCE



J.P.Morgan



Contact Us



Michael Faraone

Senior Managing Director

Michael Faraone is a Senior Managing Director with over 25 years of capital markets experience including as an investment banker focused on middle-market growth.

✉ michael.faraone@shadowlakeadvisors.com

☎ 727.776.7465



Andrew Fenton

Senior Managing Director

Andrew Fenton is a Senior Managing Director at Shadow Lake Advisors. Andrew focuses on the origination and execution of mergers and acquisitions as well as capital raising.

✉ andrew.fenton@shadowlakeadvisors.com

☎ 813.298.2523



Matt Diamond, CPA | CFA

Senior Managing Director

Matt Diamond is an accomplished finance leader with over 15 years of experience spanning accounting and tax, corporate finance and investment banking. He specializes in tax preparation for small businesses and has a proven track record of helping clients reduce their tax burdens and achieve their business goals.

✉ matt.diamond@shadowlakeadvisors.com

☎ 720.882.1002



Cameron Kurzeja, CPA

CFO Advisory

Cam Kurzeja serves as the CFO of a \$150 million revenue company and has significant accounting due diligence and quality of earnings experience from a national accounting firm.

✉ cam@shadowlakeadvisors.com

☎ 248.697.6460



Bill Bright

Senior Vice President

Bill Bright is a Senior Vice President of Business Development who cultivates relationships with successful entrepreneurs across the United States. He educates business owners about the accounting and capital market options at their disposal.

✉ bbright@shadowlakeadvisors.com

☎ 727.977.3122



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ADVISORS

ShadowLakeAdvisors.com