

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.

CFO Services

- ◆ Accurate monthly financial statements that withstand investor, lender and auditor scrutiny
- ◆ Budgeted vs. actual monthly/annual spending
- ◆ Custom Key Performance Indicator (KPI) dashboards with the data needed for timely business decisions
- ◆ Scenario planning (e.g., expansion, divestiture, sales expansion, etc.)

- ◆ Audit preparation work (for clients anticipating their first audit or struggling with the annual audit process often required by lenders or outside investors)
- ◆ 13-week cash flow forecasting
- ◆ Custom ad hoc analysis
- ◆ Business and personal tax planning, preparation and filing

Tax Services

- ◆ Prompt response
- ◆ Proactive communication throughout the year
- ◆ Available for ad hoc questions
- ◆ Tax planning for minimized tax expense
- ◆ Tax preparation for business entities (e.g., LLCs, partnerships, C corps, S corps) and high net worth individuals

TEAM LEADERSHIP EXPERIENCE



J.P.Morgan



CREDIT SUISSE 

Deutsche Bank 

accenture

RAYMOND JAMES

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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.

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**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.

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**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.

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**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.

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**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.

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ADVISORS

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