

FREE FOR OWNERS OF \$5M-\$100M BUSINESSES

How *right-sized* is your finance function?

The Right-Size Finance Assessment compares how your accounting and finance work today with what a company your size needs, and shows which level of support fits: fractional accounting, a controller, or VP of Finance or CFO leadership. It's a light snapshot you fill in yourself. For an in-depth diagnostic, see our paid Quality-of-Close Assessment.

Free · no obligation

10-15 minute questionnaire

45-minute results call

3-page results report

Ten dimensions, scored 1 to 5

01 Bookkeeping accuracy & timeliness	02 Month-end close	03 Financial reporting & KPIs	04 Cash & receivables	05 Budgeting & forecasting
06 Controls & segregation of duties	07 Systems & automation	08 Finance team & roles	09 Lender, investor & audit readiness	10 Strategic finance & deal readiness

How it works

- 1 **15-minute intro call.** Your business, your goals, and confidentiality.
- 2 **Answer 30 questions.** In plain English, about 10-15 minutes.
- 3 **Optional documents.** Your last 3 months of financials, a trial balance, and your A/R aging. Exports only, never logins.
- 4 **45-minute results call and a 3-page report:** your scorecard, top gaps, a right-sized plan, and a 30-60-90 day roadmap.

What you'll learn

- ◆ Where your finance function is strong, and where a lender, buyer, or auditor would push first
- ◆ Your maturity on each dimension, compared with a right-sized target for your revenue
- ◆ The level of support that fits now, and when you'd move up or hire full-time
- ◆ A practical 90-day plan you can use with or without us

Built by former public-company and global finance executives who have led finance for \$500M to \$6B+ enterprises. Everything you share stays confidential, and we're glad to sign an NDA.

Request your *free* assessment

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