

# CFO Services

As an executive, it's tough to go it alone. Whether your organization is investor-backed, emerging or mature, you need a source for strategic advice and support to meet your organization's financial, operational and technical needs. Bridgepoint Consulting, a leading provider of financial, management and technology consulting, has partnered with hundreds of companies of all growth stages and sizes in this important advisory role to help them achieve their short- and long-term goals.

## We provide strategic direction and objective expertise to help companies succeed.

Whether an organization needs a part-time or interim CFO, Bridgepoint can provide the leadership and direction appropriate for the stage and growth strategy of your company. Our experienced executives have a wealth of knowledge to assist CEOs, management teams and boards to develop and execute high level strategies and action plans. With client success in mind, our leadership support extends beyond the finance and accounting functions, as our CFOs thoughtfully evaluate all areas that affect the financial and operational success of your businesses. From business plan inputs and HR management, to M&A support and communications with boards and bankers, Bridgepoint can add value company-wide. Here are some things that set us apart:

**Vast Leadership Expertise** – In addition to advising a broad scope of clients at Bridgepoint, each member of our CFO team has held financial leadership positions within multiple organizations. We have encountered countless business scenarios with companies in all industries and stages of growth. This vast experience, coupled with our ability to tap into professional insights with the extended Bridgepoint team, gives our clients access to an unmatched wealth of knowledge to achieve success and avoid pitfalls.

**Client Focused Philosophy** – Bridgepoint professionals understand that we do not succeed unless our clients succeed. We create a collaborative relationship with our clients to precisely blend our leadership expertise to add value exactly where it's needed. Whether a client needs two hours a month or twenty hours a week of our advisory services, our flexible model and unbiased objectivity allows us to provide short-term or ongoing targeted leadership to help your business excel.

**Measurable Results** – Our CFOs understand the velocity of time and money. We are adept at working to quickly identify unexplored avenues and optimize the outcomes of the most complex business issues. Our clients keep coming back to us because we deliver results. And our flexible outsourcing model gives our clients the best value and ROI. We are committed to doing what we say we'll do – on time and on budget.

Bridgepoint provides high value services to elevate your company to where you want to be.

### Enterprise Value Enhancement

- Cash Flow Enhancement/Management
- Recapitalization
- Profit Optimization
- Business Model Evaluation
- Strategic Planning and Functional Leadership

### Risk Management

- Audit
- Corporate Governance
- Regulatory Issues
- Transactional Assistance
- M&A Advisory Services
- Acquisition/Divestiture Planning
- Financial Due Diligence
- Deal Structure Recommendations
- Negotiation Strategy
- Exit Strategies
- IPO Readiness

### Operational Improvements

- Board & Management Communications/Reporting
- Financial Process Improvement
- Establish and Monitor KPIs
- Business Decision Support
- Capital Structure Improvement



# Bridgepoint CFOs add value in all phases of growth

**START-UP** – During this phase, we work with the company CEO and executive team to refine the business model with a focus on the financial aspects of the plan and build the financial forecast to reflect the business model. We ask the hard questions and ensure clarity and transparency around the funding requirements to launch the company. We help define market potential, perform pricing and margin analysis, negotiate with funding sources, perform due diligence support to close the financing, monitor cash, and create Board communications. We can also assist in establishing banking relationships that help support future growth. Furthermore, our CFOs are accustomed to working with the limited resources of early-stage companies.

**EMERGING** – As a Company gains traction and begins to generate revenue, our CFO services address financing requirements, monitor success in market penetration, develop sales compensation plans, establish product pricing and margin metrics, build an infrastructure and organization to support back office operations, enhance cash flow, and report operational and financial results to management and the Board.

**HIGH GROWTH** – During this phase, our CFOs drive client successes through organization development, acquisitions, evaluating and understanding market dynamics for exits, and implementing best practices to leverage company infrastructure. This may include exploring new production facilities or development sources, as well as continued monitoring of costs and margins. This phase often presents financing challenges and typically requires different sources to fund growing demands as working capital requirements increase to meet the needs of rapid growth.

**SMALL MATURE** – As a company matures and grows to more than \$20 million in revenue, they will establish an accounting department and organization structure. We provide advice on the personnel needed to best staff the accounting function. We provide senior leadership to these organizations to keep operations efficient and effective, with a continued eye on budgets and operating metrics. Additionally, we help companies monitor valuation metrics and issues important to investment bankers or acquirers as the company positions itself for an exit.

**LARGE MATURE** – During this phase, we provide senior leadership to companies during a CFO vacancy or a strategic need such as new product additions, product extensions, new markets, international expansion, and acquisitions. All of these require senior leadership to address the critical finance issues.

**Example: PR AND ADVERTISING AGENCY** – \$20MM+ Company had a CFO that was fraudulently reporting financial results and almost drove the company out of business. The company was out of cash and \$1.5MM in negative equity. Bridgepoint was engaged as part-time CFO and unraveled fraudulent reporting for the prior two years, secured a substantial line of credit, and developed the financial model revealing the need for a change in product mix. Within two years of engagement, company pivoted and had positive equity. Bridgepoint continues as part-time CFO approximately 20 hours per month, overseeing accounting, HR, IT and operations, including all contract oversight.



AUSTIN DALLAS HOUSTON

Bridgepoint Consulting is a leading Texas-based professional services firm that provides strategic services and highly qualified professionals to solve complex financial, management and technology challenges. Since 1999, we've been helping executives and management teams reduce their business and operational risks, bridge resource gaps and improve overall performance. Whether an organization needs interim or permanent expertise to improve infrastructure and processes, or strategic management of a major transition or transaction, Bridgepoint's team of qualified professionals can help.

**Contact us today.** Find out how Bridgepoint CFO Services can add value and elevate your company to where you want to be.

[BridgepointConsulting.com](http://BridgepointConsulting.com)

Corporate Headquarters  
6300 Bridgepoint Parkway  
Building I, Suite 575, Austin, Texas 78730  
CALL 512 437-7900