

CCFO SERVICES

The New Frontier:

- Taking clients from \$3,000 a year to \$3,000 a month

CFO SERVICES
A Practical How-To Guide for Accountants

Services On The Up

Business Advisory Services

1. Strategic Planning
2. Profit Improvement
3. Benchmarking
4. Key Performance Indicators (KPIs)
5. Business Coaching

Services On The Up
Wealth Management




Wealth Management
Circle of Life

Other, Tax, Investments, Retirement, Estate Plan, Income Protection, Insurance, Mortgages, Education, Business Planning

Business is great and we're looking for more!

The changing face of the profession



Challenges

- Attracting the next generation
- Keeping them interested in their jobs and stimulated by their work

Work Anywhere, Anytime



EMPLOYEES ACCOUNTANTS BUSINESS OWNER

Zero Entry

We can now connect:

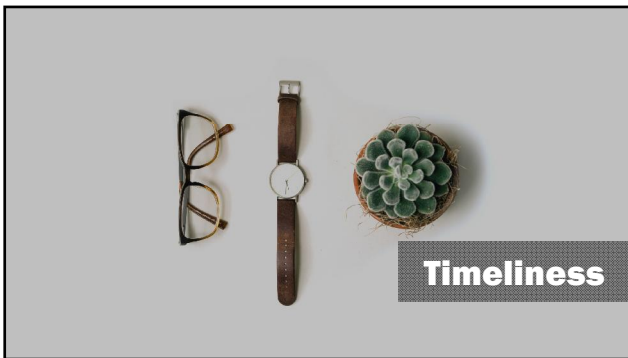
- Customer-entered data
- Vendor-entered data
- Employee-entered data
- Recurring entries
- Bank feeds

So that we don't enter data anymore

OUTSOURCING

What do your clients
REALLY need?

What do your clients
REALLY want?








Pull Tactics - Content

- Video
- Why? Youtube is the #2 search engine
 - Answer FAQs
 - Demonstrate expertise
 - Show personality



The best firms create a
WOW
experience!

Wowing your clients begins before they arrive



A composite image showing a mobile app interface. On the left is a desktop-style website layout with a navigation menu (Home, About Us, Services, Contact Us) and a main content area with the heading "ACCOUNTING EXPERTS". In the center is a smartphone displaying a text message conversation with the phone number (415) 904-8000. On the right is a "Directions" section with text instructions for driving from the north and south, and a map showing the location in the San Francisco Bay Area.

**RESERVED
FOR**
Chris Frederiksen, CPA











What makes you different?



**"It doesn't take much to
move from good to
GREAT"**

Jim Collins, "From Good to Great"
