

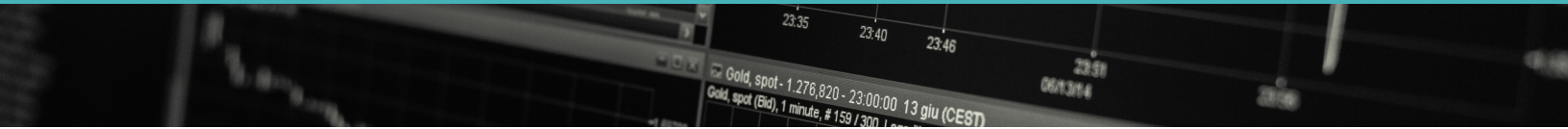


**ANDREW
HUNZICKER**
CPA

The Top 5 Secrets To Know Before Hiring A Part-Time CFO

Hiring or retaining a Part-Time CFO is a huge decision that will often cost \$4-\$10k a month and often for only 4-8 hours of time. To make that decision wisely, a CEO must be informed of what you SHOULD get in terms of key deliverables and how that will add Value to your Company and your Wealth.

WWW.CEOCFOS.COM/MORETHANCFO





ANDREW HUNZICKER CPA

Why listen to me?

Andrew Hunzicker, CPA, CEO, CFO

- 28 years of accounting experience, including Big 4 and founder of many companies (4 exits over \$20 Million)
- Have taught over 500 of other CEOs, CFOs, CPAs, Attorneys across the US how to Accounting, Tax, & Wealth RIGHT!
- Award winning CFO skills (2017 “CFO of the Year” runner-up, Oregon), CPA award winner for highest score on CPA exam
- Nationally recognized speaker and author

Forbes

WSJ

Bloomberg

**GREEN
Entrepreneur**

**accounting
TODAY**

WWW.CEOCFOS.COM/MORETHANCFO





ANDREW HUNZICKER CPA

1.

Are They A CPA?

The first step in adding value to your Company, is making sure you have world class accounting: systems, tools, procedures. If your CFO is NOT a CPA (and many are not), it is very likely they will not have the knowledge or tools to make sure your Accounting is rock solid.

The absolute first premise of making money is DON'T lose any! To do that, your accounting foundation needs to be in place to have "audit proof" books, to protect you in any financial or IRS audit, to prevent theft and fraud, to provide easier access to capital, AND to give you the correct numbers to manage your business.

Reports built on "poor data" are "poor reports". Don't be fooled! World Class Accounting is a must to build a World Class Company and will easily add 10% to your bottom line in overall value.



ANDREW HUNZICKER CPA

2.

What Deliverables Will They Produce Each Month?

- Accounting Policies, Procedures & Internal Controls. They must create and tailor this document to your business and update it quarterly. This ensures your accounting policies are in place, you have controls to ensure accurate and timely accounting, you have effective risk mitigation, and are “audit ready”.
- Perpetual Data Room. This is where they create, upload, and store all permanent files (corporate, legal, leases, notes, insurance etc.) and recurring files (all month end documents such as bank statements, payroll reports, expense reports, month end systems and more). This Data room is owned by you the CEO, and available to you, as well as any investors, lenders, or auditors as you see fit any time and all the time.
- Month End “tie-out” system. This is an actual excel file/report that ties out every single balance sheet and significant P&L account: its your audit trail from transaction to source document to chart of accounts to general ledger to trial balance to financials. It is easy to understand and done every single month so you have “audit proof” books now and forever (whether you keep your CFO or not). This will also be a structured system to find and fix errors and add correct accruals every month, including supporting documentation.



ANDREW HUNZICKER CPA

- Monthly Financials including Balance Sheet, Income Statement, and Statement of Cash Flows that are presented in clear, understandable, useful format.
- Value Add Reports. These include at a minimum an understandable, reliable 6 month cash forward forecast, budget vs actual and variance analysis, financial ratio analysis, competitive benchmarking, KPIs and scorecards, and other analytics such as margin analysis.
- What about the deliverable of being available, responsive, and able to answer any question you have? Do they get back to you the same day? Are they there when you need them?
- Do they have a supporting “team”? Are they “solo” or do they have a team where they can get ANY question answered, any time you have one that includes all skill sets (CFO, CPA, tax, wealth and legal experts)?
- Do they consider your “entire” wealth picture or only your Company during monthly reporting?



ANDREW HUNZICKER CPA

3.

They Must Have The Tools And Systems Already In Place Before You Hire Them

To provide the deliverables, they must have systems for each of these items already built and proven including a close checklist that will show exactly each month when each process will occur, who is responsible, when it will be delivered, how it will be reviewed and how it will be reported to the CEO.

Do they understand your Niche and have the tools specifically tailored for that niche?



ANDREW HUNZICKER CPA

4.

They Must Have A Plan For Your "Complete" Financial Picture

Your CFO should do a deep dive into your entire Company and personal situation and coordinate with your Tax CPA, bookkeeper, tax attorney, estate attorney, insurance, and financial planner to make sure you are maximizing your entity value, minimizing tax liability, while protecting your assets and building a succession & wealth plan. (and if you don't have all these, the CFO should plan to put these into place):

- What entities do you use, what structures are best, and how do the 2017 tax laws come into play, related to new C corporation benefits & 1202 laws?
- Are you minimizing your tax exposure via use of current laws, strategies, insurance, retirement plans, etc.?
- What strategies are being used for risk mitigation, insurance, "non-insurable risks" and risk of loss?
- What estate plan is in place, use of trusts, succession and exit planning?
- What is your investing and wealth plan and how does that inter-relate with your business?
- What is your investment strategy, who leads this, and where are you most exposed?



ANDREW HUNZICKER CPA

4.

They Must Have A Plan For Your "Complete" Financial Picture (Continued)

We find that most CEOs don't have a complete team with all the "bases" covered: CFO, Tax CPA, Corporate Attorney, Tax Attorney, Estate Attorney, Insurance (all risks and planning), Financial and Retirement Planning Advisor. And on top of that, nobody is managing this team to

- 1) Make sure they are delivering what they should each month for what you pay and
- 2) that there is coordination among these professionals so your overall personal and company strategic long term plan is optimized among all these key areas.

Most of these providers are not proactive (good luck getting any real tax planning if you don't know what you should be asking for) and CEOs don't know the "deliverables" that these providers can implement to add significant value to the Company and the CEO.



ANDREW HUNZICKER CPA

5.

There Is A Better Way

Introducing “More than Just a CFO” Program

Part CFO: coaching and mentoring from a Nationally Renowned, Award Winning CPA/CFO, where I'll help make sure you get your questions answered and get your team right & doing what they should, to add 10-20% to your bottom line.

Part Education: You'll get a “Real World MBA” in less than 30 minutes a day for 60 days, so you will be much more able to manage as well as know what to expect from your team and Accounting/Finance/Tax function.

Part Real Tools, Templates, Processes, and Systems: with these you can better manage your team and show them the exact tools and processes and deliverables you expect each month.

Part Community: be part of an active daily community with CPAs, and CEOs where you can get your questions answered as well as network with your peer CEOs.

WWW.CEOCFOS.COM/MORETHANCFO

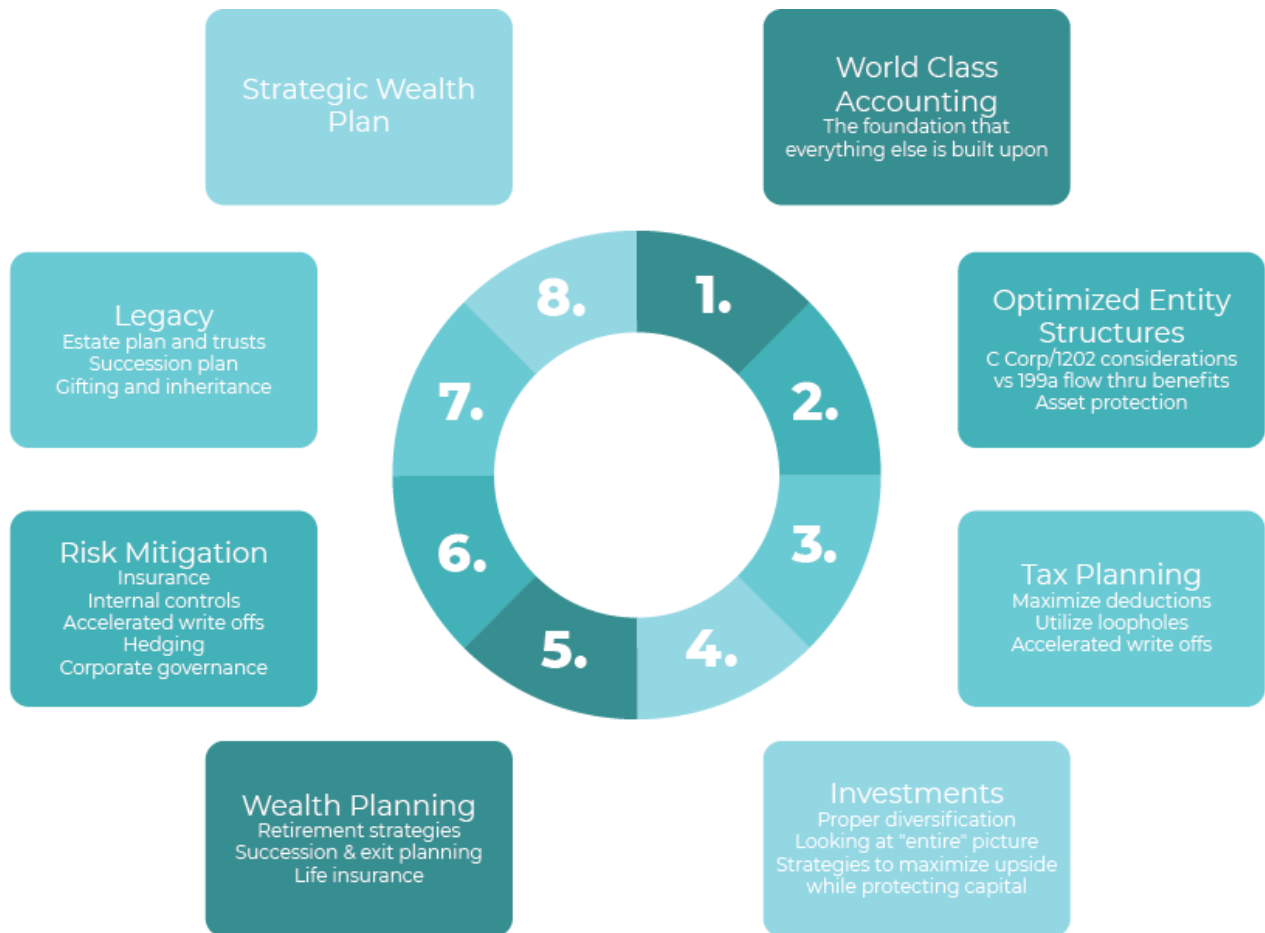




ANDREW HUNZICKER CPA

More than Just a CFO

Our program will cover all 8 of these key pillars and create your very own Strategic Wealth Plan!



WWW.CEOCFOS.COM/MORETHANCFO



ANDREW HUNZICKER CPA

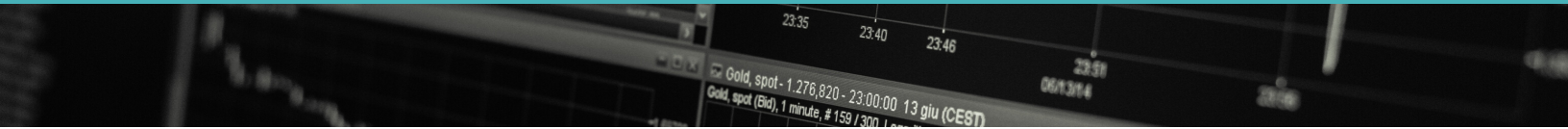
If This Sounds Like It's What You're Looking For:

Email Andrew@cfo bend.com

For a free review of your specific situation and the options you have to get "More than Just a CFO".



WWW.CEOCFOS.COM/MORETHANCFO



23.35 23.40 23.46 23.51
Gold, spot - 1.276,820 - 23:00:00 13 gtu (CEST)
Gold, spot (Bid), 1 minute, # 159 / 300



ANDREW HUNZICKER CPA

More Than Just A CFO Program

Here's what's included:

- CFO Coach: online coaching and mentoring from a Nationally Renowned, Award Winning CPA/CFO, where I'll help make sure you get your questions answered and get your team right!
- Knowledge: A 60 day "Real World MBA" in Finance, Accounting, Tax & Wealth
- Tools & Systems: Immediately "plug and play" ready: For your Accounting team, Advisors, and Company
- Access to Andrew Hunzicker, CPA, CFO, CEO via online group, online office hours, and live Q&A calls
- Access to Community of Experts, CFOs, CPAs, Advisors, and Trained Bookkeepers as well as 7 figure CEOs

Visit the website below to learn more!

WWW.CEOCFOS.COM/MORETHANCFO



ANDREW HUNZICKER

CPA



I would like to start by saying...this is the best professional investment I have made to date!...I simply can't say enough...completely top notch!...Again, thank you very much for being accessible as well as a gentleman. You are a rock star!

- **Damon M.**



Got it, thanks so much, I just watched both of your videos. Very useful and a ton of knowledge. I'm really looking forward to the rest of it. You've really illustrated that the gap between what I know and what I should know is wide, and I'm excited to see what business life is like with it closed. I guess for me personally, I'm always focused on marketing and leaving the CFO stuff as an afterthought since it's mostly for tax purposes. I like how you've removed a bit of guilt (since even massive companies have errors) but also shown how valuable world class financials are.

Thank you Andrew

- **J.K.**

The course is beyond compare and is constantly updated with new info. Also there are live trainings, Q&A sessions, a private FB group to ask questions in and much more. Costly, but the best money I've ever spent on professional training of any type. Highly, highly recommend.

- **Susan C.**

WWW.CEOCFOS.COM/MORETHANCFO



Time	Value
23:35	
23:40	
23:46	
23:51	
06:13:14	
Gold, spot - 1.276,820 - 23:00:00 13 gtu (CEST)	
Gold, spot (Bid), 1 minute, # 159 / 300	