

Outsourced

# CFO Advisory

A virtual and fractional Chief Financial Officer advisory solution for small and medium-sized businesses that generate over \$500,000 in revenue per annum.



**June 2022 - June 2023**

MaxPoint Advisors LLC is U.S.-based non-CPA financial advisory firm. All accounting related services are provided by our partner CPA firms. MaxPoint Advisors LLC does not render legal advice, investment advice, or engage in financial market speculation, trading, underwriting services, or private lending.

**Email:** [connect@maxpointadvisors.com](mailto:connect@maxpointadvisors.com)

**Website:** [www.maxpointadvisors.com](http://www.maxpointadvisors.com)

**Contact Number:** 888-403-7003

**Main Office:** Indianapolis, Indiana, USA

# Table of Contents

---

**Page 2** About MaxPoint Advisors

**Page 3** Our Management Team

**Page 4** What is CFO Advisory?

**Page 5** Challenges for Growing Business and Business Owners

**Page 6** How the *MaxPoint Path* Solves those Challenges

**Page 7** 7 Key Benefits of Adding a MaxPoint CFO to Your Team

**Page 8** How to Get Started



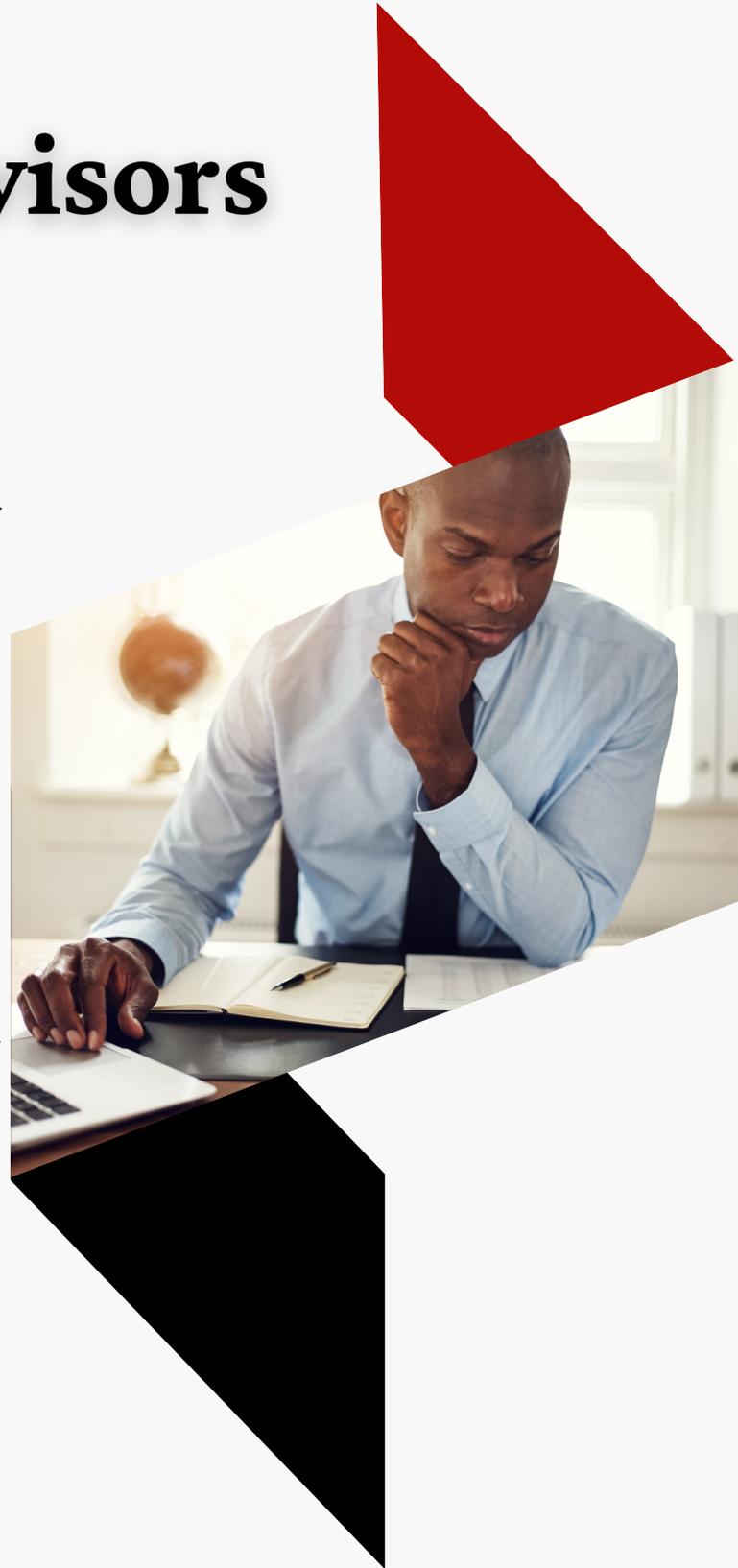
# About

## MaxPoint Advisors

MaxPoint Advisors is a firm of professionals that are seasoned in corporate finance, accounting, management, and above all, the skills required to bring value, leadership, and guidance for the finance function of small and medium-sized businesses.

Our CFO Advisory team is not simply just another accounting firm or financial consultant. We are a hands-on and committed financial business partner that is dedicated to being co-creators of the future of our client's business. That's what makes us different than the average CFO consultant and advisory firms - *we are co-creators of the future success of our client's businesses.*

MaxPoint Advisors is a non-CPA financial advisory firm and was formed in 2020. The company is headquartered in Indianapolis, Indiana, USA.





# Our Management

## Julius Mansa, MFin

Julius Mansa is the founder of MaxPoint Advisors and serves as its managing partner. Julius has been an operations, finance, and accounting professional for over a decade, with a sharpened financial management expertise in various industries including financial services, fintech, logistics, real estate development, and the nonprofit sector.

Julius's career includes various corporate finance roles ranging from senior financial analyst to financial controller in the logistics and real estate development sectors, in addition to leading the finance function of several non-profit organizations. Within the realm of logistics, Julius has experience in supply chain finance management for regional and international third-party logistics (3PL) companies. Additionally, for over 3 years, Julius acted as a fractional Chief Financial Officer for an Indianapolis-based real estate development firm with a multi-million dollar portfolio. After his rewarding experience doing fractional CFO consulting, in early 2020, Julius opened MaxPoint Advisors, a CFO advisory firm that focuses on medium-sized businesses that operate in fast growing sectors and gross between \$500,000 and \$15,000,000 in revenue.

As an emerging academic and researcher, Julius serves as a professor of finance where his current and past lecture areas include intermediate accounting, managerial finance, risk management, corporate valuation, portfolio management, and financial economics. In 2020, Julius was awarded a prestigious and highly competitive U.S. Department of State Fulbright Program research award in the area of financial technology.

### Education

**Doctor of Business Administration (DBA)**

Touro University (2023)

**Master of Finance (MFin)**

Colorado State University

**Bachelor in Interdisciplinary Studies (BGS)**

Indiana University

### Industry Contributions

**Reviewed and Approved**

Over 2,500 finance and economic articles on Investopedia.com, TheBalance.com, and The Balance Small Business

# What is CFO Advisory?

A virtual, fractional, interim, or outsourced CFO (Chief Financial Officer) Advisor is a highly-skilled and experienced corporate finance management professional that employs a dedicated, tactical, and comprehensive forward-thinking approach to helping businesses understand their financial performance and plan for future growth.

Whether they're the CFO of a multi-billion dollar corporation or a small business, a CFO brings value to a company by leading the strategic enhancement of revenue, profit, and cash flow in the companies of which they are a part.



With an average CFO salary range between \$200,000 - \$500,000 per year, most small and medium-sized businesses cannot afford a full-time Chief Financial Officer and the advanced skillset they bring to the table. In a fractional and virtual capacity, MaxPoint Advisors allows growing companies to tap into the fine-tuned competencies that CFOs can bring to their organizations. In general, a CFO can add value by executing the following:

- Business Modeling, Forecasting, Metrics and Analysis
- Proposal and Implementation of Tactical Corrective Actions
- Cash Management, Treasury, and Banking
- Profit Improvement Planning and Restructuring
- Merger, Acquisition, Sale, and Due Diligence Leadership

# Challenges for Growing Businesses & Small Business Owners

## Challenge #1: The business relies on the owner(s), or it all falls apart.

- The owner is wearing all the hats (marketing, operations, sales, HR, etc.).
- In fact, they may be wearing hats that they don't want, nor are they particularly good at.

## Challenge #2: The business owner(s) is constantly battling a 'catch-22' situation.

- They can't grow their business without more money, but they can't get more money without growing their business.
- They started this business to create freedom of time and money, but when there's not enough profit, they end up working harder and longer.

## Challenge #3: The business owner doesn't have a simple way to understand what's working – and what's not – in their business.

- The typical financial reports (P&L, Balance Sheet, etc.) are made for accountants, not business owners. They are downright confusing, and they don't tell the whole story.
- It's hard to understand exactly what's working – and what's not working just by looking at these reports.
- To make matters worse, the 'numbers people' (like their accountant and bookkeeper ) seem to always be speaking a foreign language.

## Challenge #4: The business owner does not have clear goals.

- How does a business owner know if they're making progress if they don't know where they want to end up?
- They don't have clear targets for revenue, profit, and the bank account.
- This is the equivalent of getting in the car and driving without having a clear destination. You'll waste a lot of gas and a lot of time.

## Challenge #5: The business owner does not have a clear path to follow to have a growing and more profitable business

- There are many things that owners could be doing in their day, but only a handful will actually make a difference in the three things that really matter: **revenue**, **profit**, and **their bank account**.

**We have a solution to fix these challenges, and it's called...**

**The MaxPoint Path**

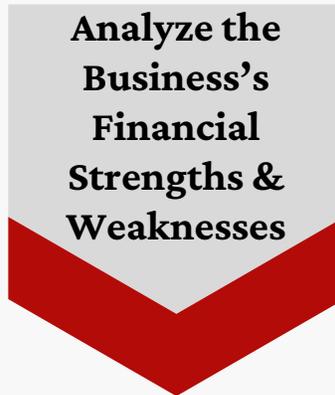


# The One and Clear **MaxPoint Path**

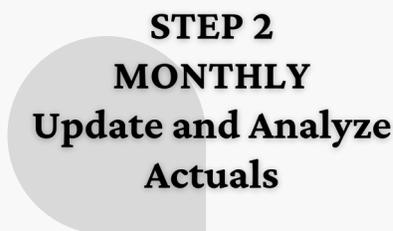
The MaxPoint Path is *our answer*. The MaxPoint Path is *your solution*.

The MaxPoint Path is **simple**: it's our proven method to help growing businesses overcome financial and operational challenges and set the tone for executing strategies that contribute to future growth.

## The MaxPoint Path has 3 Core Objectives:



The MaxPoint Path is made up of six steps that our CFO Advisors will lead you through to have a growing and more profitable business.



# 7 Benefits of Adding a CFO Advisor to Your Team

## BENEFITS FOR YOU

**1** One clear path to enhance revenue, profit, and cash flow in your business.

**2** Increase in yearly take-home pay, stock dividend, and owner distributions.

**3** Access to experienced corporate finance management professionals for a fractional cost.



**4** Enhanced organization for the finance function of your business, which improves financial data.

**5** Better financial data leads to improved decision-making for business owners.

**6** Investors, lenders, and creditors react positively to the knowledge that a professional CFO has been retained.

**7** Improved control of the company's assets.

# How to **Get Started**

Enhancing your senior leadership team with a virtual CFO happens in 3 simple steps.

## **1** Schedule a Discovery Call (1 -2 hours)

During the discovery session, the business owner(s) or executive managers will meet with one of our CFO Advisors to discuss financial and operational challenges. The goal of this session is to see if your company and MaxPoint Advisors is a right fit for each other. The discovery session will typically be conducted via video conference or on-site visit.

## **2** Financial Assessment & Review Findings (1 week)

After a successful discovery session and signing of any required non-disclosure agreements, the CFO Advisor will request financial statements (compiled, reviewed, or audited) from your company's accountant or bookkeeper. The key documents needed are your updated Profit & Loss Statement, Balance Sheet, and Cashflow statement. This assessment will show you what's going right and what's going wrong. It will spot any red flags and opportunities for growth. It will also give you a roadmap of what your CFO Advisor thinks needs to happen within the next 12 months in order for you to make more money.

## **3** Sign Engagement Letter & Service Agreements

The service agreement and engagement letter will outline the scope of work, deliverables, and requirements for both the CFO Advisor and the business owner or executive manager.



**Schedule a Discovery Call**

**TODAY**

by visiting us at

[www.maxpointadvisors.com](http://www.maxpointadvisors.com)