

Introducing...



Boardview by Your CFO





Boardview by your CFO

With an outsourced CFO working at the heart of your business you will get proven expertise embedded into your senior management team.

A strategic framework to take your business to the next level

What You Get



Professional Board Meeting



Extensive Business Evaluation



In-depth Financial Assessment



Strategic Business Plan



SMART Goals



Growth Strategy



Wealth Planning



Risk Management



Exit Strategies

Key Benefits

- ✓ Director support at a fraction of the cost
- ✓ Enhanced financial clarity
- ✓ Boardroom level experience
- ✓ Accountability Framework
- ✓ Customised solutions
- ✓ Maximise operational efficiency
- ✓ Accelerate growth
- ✓ Long term business plan

Your CFO Experience

- 1 Financial Information Foundation
- 2 Business Assessed
- 3 Strategy Formulated
- 4 Monthly Boardview
- 5 Detailed Tax Planning
- 6 Project Delivery
- 7 Exit Strategy

"I had the pleasure of working with Graeme and Phil as part of their CFO program. They had an incredible understanding of my industry and business and were very helpful in forming plans and goals for the next journey within the company."

Gareth Hardwick, JPT Roofing Ltd



Boardview by Your CFO

Find out more about how our outsourced CFO service works

1. How does the strategy day work, and what should I expect?

The strategy day is an immersive session where we assess your current position, define your goals, and create a strategic roadmap, all tailored to your business vision.

2. What can I expect from each quarterly Boardview meeting?

Each review includes a detailed financial analysis, progress updates on your goals, risk assessments, and tailored action plans to drive your business forward.

3. What if I need additional support between meetings?

Your CFO is available to provide support and advice as needed, ensuring you have guidance to navigate any challenges that come up between sessions.

4. How will this service help me grow my business?

We provide strategic financial advice and planning that aligns with your business goals, helping you expand in a financially sustainable way.

5. How detailed is the financial forecasting?

Our financial forecasting includes profit and loss, cashflow projections, revenue estimates, and break-even analysis to give you a complete view of your financial future.

6. How does this support my long-term goals, like exiting the business?

Quarterly reviews keep your exit strategy and long-term objectives aligned, ensuring that each decision made supports the ultimate vision you have for your business.

7. What type of funding can you help me secure?

We can assist with a wide range of funding options, including bank loans, government grants, investor funding, asset finance, and alternative finance solutions.

8. How do you ensure the funding options are suitable for my business needs?

We conduct a thorough analysis of your financial situation, business goals, and cashflow to match you with funding options that best align with your specific requirements and long-term objectives.

9. Is this service suitable for businesses of all sizes?

Yes, whether you're a small business looking to expand or an established company ready to scale, our service is tailored to your specific growth needs.

10. What types of projects are included in ad-hoc CFO support?

Ad-hoc projects cover a wide range of strategic and financial services, including tax planning, remuneration, restructuring, and support with complex transactions.





Is Boardview by Your CFO Right for Your Business?

Complete the checklist below to determine the benefit an Outsourced CFO could have on your business:

Strategic Planning

- ☐ Do you need help creating simplified plans or monthly updates to keep your team focused?
- ☐ Would detailed forecasts and budgets improve your decision-making?
- ☐ Do you need to create a new growth strategy in order to scale your business sustainably?

Operational Needs

- ☐ Do you have a clear business vision, but need guidance in turning it into actionable strategies?
- ☐ Would a structured framework and regular reviews help you stay on track with your goals?
- ☐ Are you seeking ways to optimise your processes and reduce costs?

Ongoing Support

- ☐ Would regular performance reviews and KPI tracking help you achieve your goals?
- ☐ Do you want a hands-on CFO who is actively involved in decision-making and strategy execution?
- ☐ Would support with funding or asset finance strengthen your cash flow?

Exit Strategy

- ☐ Are you considering a business exit, such as a sale, merger, acquisition, or succession?
- ☐ Would guidance on exit planning, including buyer identification and negotiations, benefit you?
- ☐ Do you want to maximise the value of your business during a transition?

How much would you benefit from an Outsourced Financial Director?

- 1-4 checks: Several improvement options exist to meet your business goals. A CFO consultation would allow you to explore the final options to complete your strategic plan
- 5-8 checks: Your business is in a position where an Outsourced CFO would facilitate the implementation of the necessary solutions to deliver on a comprehensive business plan
- 9-12 checks: You currently have a significant gap between your business needs and the strategic framework you have in place. Putting Boardview in will provide the foundations you seek

Think you will benefit from putting an Outsourced CFO into your business? Call our team today to find out more

Email enquiries@northernaccountants.co.uk or call 0113 218 9552 to schedule a consultation or learn more about how we can support your financial needs