



**SUMMIT**  
CFO ADVISORY AND ACCOUNTING

# Strategic Finance Leadership for Growing Businesses

Fractional CFO, Accounting and Finance  
Support for Australian Businesses



Strategic Financial  
Leadership



Scalable & Flexible  
Support



Commercial  
Focus



Trusted Advisor  
You Can Count On

Helping businesses improve financial clarity, drive performance and achieve sustainable growth.

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

# OUR CORE SERVICES

End-to-End Finance Leadership and Support



## 1. FRACTIONAL CFO SERVICES

Strategic financial leadership focused on growth, profitability and long-term performance.

- Growth strategy
- Pricing analysis
- Profit improvement initiatives
- Strategic planning
- Cash flow forecasting
- Financial modelling
- KPI dashboards
- Board & stakeholder reporting
- Scenario analysis
- Decision-making support
- Business scaling support
- Operational performance analysis



## 2. CONTROLLER SERVICES

Operational financial management and reporting oversight.

- Budget preparation
- Rolling forecasts
- Variance analysis
- Internal controls
- Financial reporting oversight
- Reporting process improvement
- Compliance support
- Month-end review
- Management reporting
- Financial process management



## 3. ACCOUNTING & REPORTING

Scalable operational finance support to keep your business running smoothly.

- General ledger management
- AP / AR oversight
- Payroll coordination support
- Bank reconciliations
- Financial statement preparation
- Reporting packs
- Accounting system support
- Data management and cleanup



## 4. MONTH-END CLOSE

Structured and disciplined financial close management and reporting.

- Journal processing
- Accruals and prepayments
- Balance sheet reconciliations
- Financial reporting
- KPI dashboards
- Close process optimisation
- Reporting turnaround improvement
- Management reporting review



## 5. BACK-OFFICE SUPPORT

Reliable back-office support to streamline your finance operations.

- Finance administration
- Reporting schedules
- Workflow support
- Documentation management
- Audit support
- Operational finance coordination
- Vendor and customer support coordination



Flexible engagement models tailored to your business needs. Scale up or down as you grow.



## WHY CHOOSE SUMMIT CFO

Your Partner in Financial Success



### Experienced Finance Leader

CPA (Aust) and MBA qualified with extensive multinational commercial finance experience across Australia and globally.



### Strategic & Commercial Focus

We go beyond reporting – delivering insights, forecasting and commercial advice that drive real business outcomes.



### Scalable & Flexible

Access senior-level finance expertise without the cost of a full-time CFO or large internal finance team.



### Trusted & Reliable

We become an extension of your team, providing accuracy, transparency and confidentiality you can rely on.



### SME Growth Specialists

We understand the challenges of growing businesses and provide practical solutions to help you scale with confidence.



CPA & MBA  
Qualified



Multinational  
Experience



Commercial  
Finance Expertise



Practical Support  
for SMEs

## ENGAGEMENT & NEXT STEPS

Let's Build a Stronger Financial Future Together

### How We Work



#### 1. DISCOVER

We understand your business, challenges and goals.



#### 2. ANALYSE

We analyse your financial position and identify opportunities.



#### 3. PLAN

We develop a tailored finance plan and solution.



#### 4. EXECUTE

We implement, support and deliver ongoing results.

### Engagement Models



#### Monthly Retainer

Ongoing fractional CFO and finance support.



#### Project Based

Focused projects with defined scope and outcomes.



#### Advisory Support

Strategic advisory for key business initiatives and decisions.

### Ready to Strengthen Your Finance Function?

Let's discuss how we can help your business grow with clarity, control and confidence.



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### Book a Complimentary Consultation Today

No obligation. Just a conversation about your business and how we can help.

