



Avari Tax and Financial Services

A V A R I T A X . C O M

AvCFO® Core Services

Included in Every Engagement — Compliance, Strategic, Transformative

Whether your business is navigating multi-state complexity or preparing for scale, every AvCFO engagement begins with a commitment to clarity, control, and strategic alignment. These core services are provided across all tiers and form the backbone of our fractional CFO offering.

Monthly Financial Oversight

- Review of financial statements for accuracy, completeness, and strategic relevance
- Identification of anomalies, trends, and red flags across P&L, balance sheet, and cash flow
- Commentary on financial health and operational efficiency

Tax Position Monitoring

- Ongoing review of federal and multi-state tax exposure
- Proactive identification of SALT risks and nexus triggers
- Quarterly tax strategy check-ins to align with evolving business activity

KPI Tracking & Performance Metrics

- Establishment of baseline KPIs tailored to the client's industry and growth stage
- Monthly tracking and reporting of key financial indicators
- Strategic commentary on trends, variances, and implications

Strategic Advisory Access


- Monthly consults with your CFO advisor to discuss financial strategy, risks, and opportunities
- On-demand access for urgent decisions or compliance concerns
- Empathetic, relationship-driven guidance tailored to your mission

Compliance & Governance Support

- Oversight of financial policies and internal controls
- Guidance on regulatory filings, licensing, and audit readiness
- Support for entity structuring and jurisdictional compliance

Reporting Infrastructure & Documentation

- Standardized financial reporting templates and dashboards
- Maintenance of compliance documentation and audit trail
- Secure digital access to financial reports and strategic summaries

 *Bookkeeping services are typically handled separately and are not included in AvCFO core deliverables.*