



Avari Tax and Financial Services

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

AvCFO® Strategic Services

Ready to align financial strategy with operational goals, pricing models, and scalable infrastructure?

AvCFO Strategic Virtual Fractional CFO Services is designed for organizations that have mastered the basics and are now seeking clarity in decision-making, pricing, and performance. It blends compliance oversight with forward-looking financial strategy—delivering insights that drive growth, margin improvement, and operational efficiency.

Strategic Financial Planning

- Development of rolling forecasts and dynamic budgeting models
- Scenario planning for hiring, expansion, capital investment, and pricing changes
- Cash flow modeling with strategic commentary

Pricing Strategy & Margin Optimization

- Review and refinement of pricing models across products/services
- Margin analysis by segment, channel, or client type
- Strategic recommendations to improve profitability and competitiveness

Infrastructure & Systems Advisory

- Evaluation of financial systems, ERP tools, and reporting workflows
- Recommendations for scalable infrastructure aligned with growth goals
- Support for vendor selection, implementation planning, and integration

Advanced KPI Design & Performance Dashboards

- Custom KPI frameworks tailored to business model and strategic objectives
- Monthly dashboard reporting with trend analysis and strategic insights
- Variance analysis with actionable recommendations

Fractional CFO Leadership

- Participation in strategic planning sessions, board meetings, or investor updates
- Financial leadership in cross-functional initiatives (e.g., product launches, M&A prep)
- Translation of financial data into operational strategy

Operational Efficiency & Cost Structure Review

- Deep dive into cost centers, vendor spend, and overhead
- Identification of inefficiencies and cost-saving opportunities
- Strategic restructuring of expense categories for better visibility and control

Growth Strategy Advisory

- Financial modeling for new markets, product lines, or service offerings
- Strategic risk assessment for expansion or investment decisions
- Empathetic guidance aligned with the client's mission, values, and long-term goals

This tier is ideal for clients who want more than clean books—they want clarity, leverage, and strategic partnership. It's where financials stop being reactive and start becoming a competitive advantage.