



Avari Tax and Financial Services

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

AvCFO® Transformative Services

Built for visionary leaders facing complex transitions, high-growth inflection points, or legacy-defining decisions.

AvCFO Transformative Virtual Fractional CFO Services, specifically built for Visionaries who expect more than financial strategy—they need a trusted partner to guide them through ambiguity, risk, and reinvention. This is high-touch, high-trust advisory that blends technical mastery with deep empathy and strategic foresight.

Strategic Transition Advisory

- Guidance through mergers, acquisitions, divestitures, or ownership changes
- Financial modeling and due diligence support
- Post-transaction integration planning and execution

Legacy & Succession Planning

- Multi-year financial roadmaps aligned with personal and business legacy goals
- Coordination with estate planners, attorneys, and wealth advisors
- Tax-efficient strategies for ownership transfer, gifting, or exit

Executive-Level Decision Support

- On-call strategic advisory for CEOs, founders, and boards
- Preparation of investor decks, strategic memos, and financial narratives
- Empathetic counsel during high-pressure decisions or inflection points

Complex Compliance & Risk Navigation

- Oversight of multi-entity, multi-jurisdictional compliance
- Audit readiness and representation in regulatory matters
- Strategic risk mitigation across tax, financial, and operational domains

Business Model Reinvention

- Financial strategy for pivoting, restructuring, or launching new ventures
- Pricing and margin strategy for new business lines
- Infrastructure design for scalability and resilience

Narrative-Driven Financial Communication

- Crafting financial stories that resonate with stakeholders
- Translation of complex data into compelling, mission-aligned messaging
- Support for media, investor, and internal communications

Relationship-Driven Empowerment

- Deep engagement with client mission, values, and vision
- Proactive identification of blind spots and strategic opportunities
- Empowerment through clarity, confidence, and collaborative leadership

This tier isn't just about solving problems—it's about transforming the way clients lead, grow, and define their legacy. It's where Avari becomes not just a financial partner, but a strategic force multiplier.