



Strategic Advisory Services

Financial Leadership Services	GROW	APEX	ZENITH
Finance & Accounting Diagnosis	✓	✓	✓
Cash Flow Projections	✓	✓	✓
Budgeting & Trends	✓	✓	✓
Financial Contract & Tax Review	✓	✓	✓
Financial Goals Review	✓	✓	✓
Monthly Executive Report	✓	✓	✓
Financial Analysis		✓	✓
Senario Forecasting		✓	✓
Strategic Growth Services			
Entity & Legal Structure Review	✓	✓	✓
KPI & Dashboard Creation	✓	✓	✓
Operational Diagnosis		✓	✓
Organizational Scaling		✓	✓
Operational Goals Review		✓	✓
Competitive Positioning			✓
Operational Efficiency			✓
Transaction Advisory Services			
Buy, Sell, Hold Recommendations	✓	✓	✓
Personal Structure Review	✓	✓	✓
Exit/Acquisition Goals Review		✓	✓
Succession Planning		✓	✓
Deal Structuring			✓
Negotiation Support			✓
Due Diligence Management			✓
Add-on Services			
Strategic Planning	✓	✓	✓
DISC Training	✓	✓	✓
Personal Budgeting Training	✓	✓	✓
Recurring Meetings			
Monthly Review Session	✓	✓	✓
Support			
Trusted Referral Network	✓	✓	✓
Email Support	1 Business Day	1 Business Day	1 Business Day
Phone Support	Scheduled Calls	Scheduled Calls	Priority Calls
Terms			
Contract	Month-to-Month	Month-to-Month	Month-to-Month
Cancellation	30-Day Notice	30-Day Notice	30-Day Notice
Out of Scope Requests	Separate SOW	Separate SOW	Separate SOW