

# Gain Foresight and Take Flight With Financial Planning & Analysis

*Where innovation meets expertise to maximize your financial opportunities.*



ACCOUNTABILITY SERVICES  
ACCOUNTING • TAXES • CONSULTING



Financial Planning & Analysis goes beyond compliance to transform how you manage and optimize your company's money. We condense financial data into interactive dashboards with metrics tailored to your key decisions and goals.

As a business owner, you need visibility into your finances to navigate challenges and seize opportunities. But making sense of endless spreadsheets is a frustrating, time-consuming maze.

Take off the blindfold and gain financial foresight with our Financial Planning & Analysis (FP&A) services.

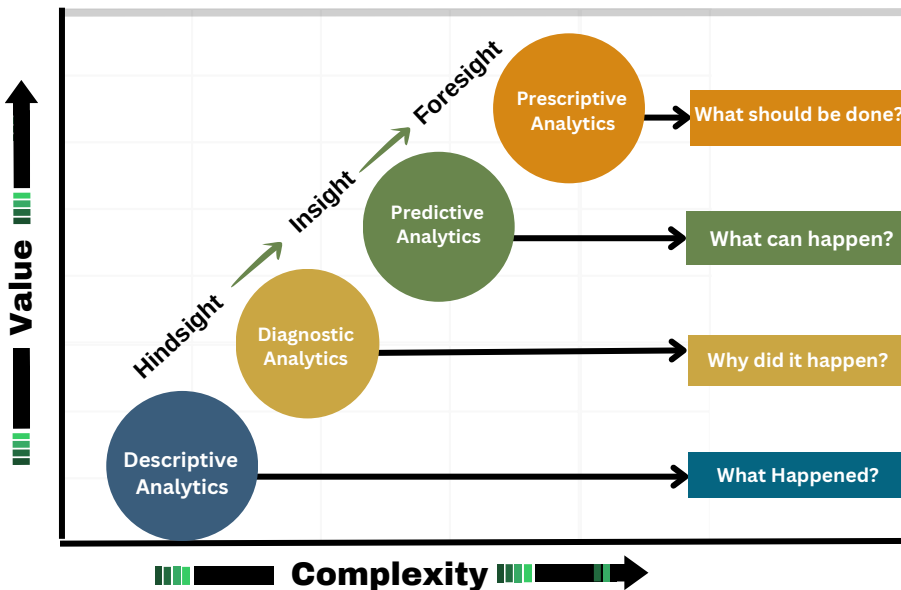
**Call (206) 522-0110 to schedule a free advisory consultation**

**In a 30 minute consultation, we'll identify the specific insights you need to:**

- Monitor revenue and cash flow
- Control overhead costs
- Optimize profit margins
- Accelerate growth
- Plan a strategic exit



## YOUR JOURNEY



## START YOUR JOURNEY

With user-friendly financial modeling and routine reporting, you'll have an at-a-glance view of performance. Issues get flagged early so you can quickly pivot. Over time, our forward-looking FP&A drives improved returns.

Don't let your business finances remain a mystery. Schedule a consultation today to see how Financial Planning and Analysis can give you the foresight to manage looking forward and maximize your post-tax wealth.

### Our Approach

Representing a new era of advisory firms, we meet clients where they are by providing options that range from just the essentials up to strategic planning.



### Our Commitment

To empower individuals and businesses to maximize their financial resources and opportunities.



### Award Winning

Firm of the Year in 2022 and Rookie of the Year in 2022, Accountability Services and Boulder Valley CPA merged to create the next generation of advisory firms operating as Accountability Services.



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## Who we are...

We are more than just accountants. We are visionaries, thought partners, and business strategists that have re-imagined the relationship between business owners and trusted advisors.

Clients can expect strategic business, tax, and financial planning and analysis that translates their goals into reality, proving that with proactive guidance, anything is possible.

## Who we work with...

### **Entrepreneurs:**

We love to work with businesses who want to grow and need strategic guidance and actionable data to get there. Whether scaling or planning for exit, our role is to help business owners maximize their financial resources and opportunities through elevating financial literacy, proactive collaboration, and strategic planning to ensure steadfast accountability.

While we work with many businesses in eCommerce, healthcare, technology, and professional services, the industry doesn't matter as much as the entrepreneurial mindset - where collaborating with a strategic partner is valued not as a business expense, but as an investment in charting your future.

## OUR PROCESS

