



AUSTRALIA AND NEW ZEALAND'S  
LEADING VIRTUAL CFO SERVICE

## OUR MANAGEMENT CREDENTIALS



# CONTENTS

OUR TEAM	3
AUSTRALIA & NZ'S LEADING VIRTUAL CFO SERVICE	3
OUR AFFILIATIONS	4
CFO ON-CALL MODEL	5
BENEFITS OF JOINING CFO ON-CALL	6
CFO ON-CALL MARKETING MASTERY	7
PARTNERING WITH CFO ON-CALL	8
FINANCIAL CO-PILOTS	9
SERVICES CFO ON-CALL OFFERS	9
YOUR SIDE OF THE BARGAIN	10
QUALITIES WE SEEK	10
WHAT DOES CFO ON-CALL PROVIDES	11
CASH FLOW BREAKTHROUGH	11
SOFTWARE CFO OFFERS	12
CFO ON-CALL WEBSITE	13
OUR LOCATIONS	13
MEET THE CFOS (CFOs and VIRTUAL CFOs ON-CALL)	14
SAMPLE REVIEWS	15-16
PURPOSE OF DUE DILIGENCE	17
DUE DILIGENCE TIMELINE	17
FREQUENTLY ASKED QUESTIONS	18
TESTIMONIALS	19
MARKETING CONTRIBUTION	20
WHAT IS THE COST?	20
WHERE TO FROM HERE?	20
GET IN TOUCH	21

## OUR TEAM



**JOSE ALGUERA-LARA**  
Director



**STUART FROS**  
Founder and CEO



**SUE HIRST**  
Founder



**JO JOHNSON**  
Marketing and  
Communications Manager



**ROSS WADESON**  
Director



**GIOVANNI TAM**  
Relationship Manager

## AUSTRALIA & NZ'S LEADING VIRTUAL CFO SERVICE

AUSTRALIA & NZ'S LEADING VIRTUAL CFO SERVICE CFO ON-CALL IS NOW RANKING #1 ORGANICALLY ON GOOGLE IN AUSTRALIA AND #6 IN NZ FOR 'VIRTUAL CFO' ON GOOGLE

## OUR AFFILIATIONS



AFSL 446176

OUR LEGACY: Proudly Part of ASVW Group | AFR Top 100 Firm

**30+**  
YEARS OF  
EXPERIENCE AND  
INNOVATION

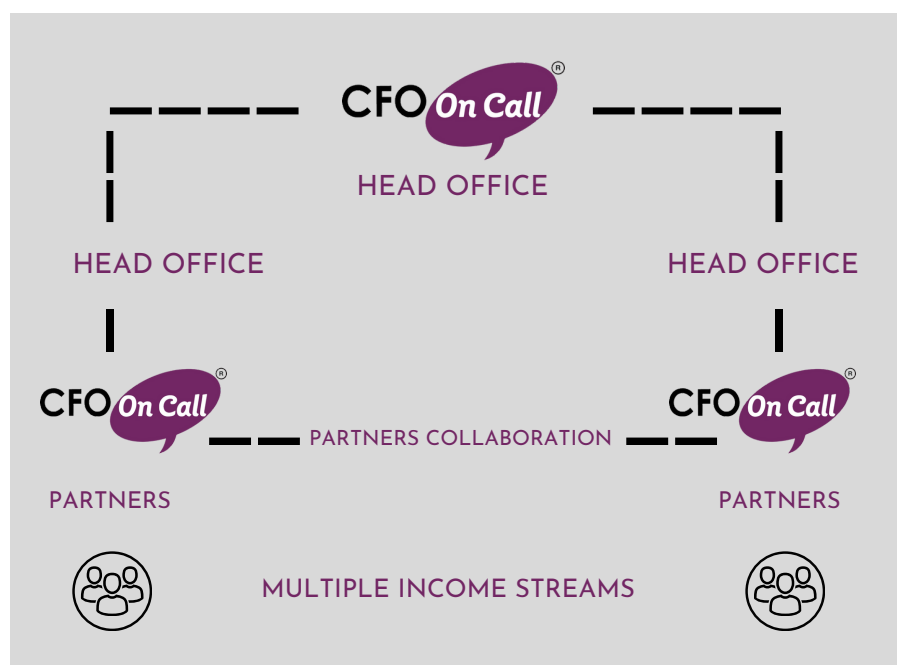
**30+**  
DEDICATED  
TEAM MEMBERS

**13**  
HANDS-ON  
PARTNERS

**8,000+**  
PROSPECTIVE  
SME CLIENTS



## THE CFO ON CALL MODEL



## Our Management Credentials



# BENEFITS OF JOINING CFO ON CALL



- ✓ Immerse yourself in our well-established ecosystem.
- ✓ Be part of ASV Wadeson Group | AFR Top 100 firm.
- ✓ Gain exclusive access to our innovative client onboarding process.
- ✓ Enjoy a comprehensive start-up package, including marketing, training, and ongoing support.
- ✓ Connect with a vast network of skilled professionals.
- ✓ Leverage our 30+ years of intellectual property, all integrated into a proven business model designed for your success.
- ✓ Capitalize on our ten-year track record in mergers and acquisitions.



## Our Management Credentials





# ACHIEVE GREATER SUCCESS WITH OUR MARKETING MASTERY

## Local Marketing Encouragement

CFO On Call supports partners in engaging with their local communities:

### National Marketing Efforts

CFO On Call invests significantly in national marketing to ensure a strong, recognisable brand presence across various channels



#### Search Engine Optimisation (SEO)

Maximising visibility on top search engines.



#### Google Ads

Strategically targeted ads to reach potential clients.



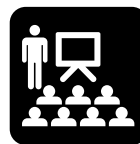
#### Social Media Marketing

Active campaigns on LinkedIn and Facebook to enhance brand engagement.



#### BNI Business Networking

Forging valuable local connections



#### Expos and Seminars

Participation in both physical and online events.



#### Online Directories and Community Engagement

Listings on Google My Business, OneFlare, Service Seeking, Apple Maps, Yelp, Foursquare, and promoting Word of Mouth to boost local visibility and community trust.

**Partner-Driven Success:** We provide extensive support and resources, ensuring you can effectively utilise national marketing strategies and local engagement to succeed.

CONTACT US



# PARTNERING WITH CFO ON-CALL



A new kind of continually improving partnership



Be part of a group of likeminded high achieving CFOs



Proven to work beyond reasonable expectations



Benefit from an experienced support team



For proactive CFOs and Financial Controllers only



You control your lifestyle, no corporate boss, work your own hours



Work with business clients in person or as a Virtual CFO



Bstar: Future of Professional Advice



Initial start-up fee includes marketing, training, and support services



Quality Client Interaction



Exclusive access to a unique client onboarding process.



Enhanced Marketing Strategies



Superior SEO Practices



Fast Response Time



Cross-Referral Opportunities



Utilize our Extensive Ecosystem



# We are 'Financial Co-Pilots'.



We have a unique process that often sells the client on the spot!



You become a client's on-call 'right-hand financial expert'



Build a business with up to 10 regular clients monthly on fixed fees and other casual clients.

## SERVICES CFO ON-CALL OFFERS

- ✓ 'No-Brainer' Quick Business Improvement Offer
- ✓ Virtual CFO Services - Australia and New Zealand
- ✓ Business Cash Flow Management
- ✓ Cash Flow Forecasting and Projection
- ✓ Strategic Planning Services for Business Growth
- ✓ Business Processes and Systems Improvement Services
- ✓ Sales and Profit Improvement and Consulting
- ✓ Business Exit and Succession Strategy Consulting
- ✓ INTERIM CFO
- ✓ Temporary CFO
- ✓ Virtual CFO for Australian Subsidiaries



## YOUR SIDE OF THE BARGAIN

We are looking to partner with exceptional people. With an increasing number of qualified leads coming in, it's vital to our brand that a potential client immediately views us as a company they want to work with.

### The partner qualities we seek:

- ✓ Quietly confident in their own accounting and technical abilities
- ✓ Proven people skills to get the best out of a team or client
- ✓ Really good listeners and can encourage clients to talk
- ✓ Proven relationship builders and networkers with a sizable existing network or
- ✓ Can enthusiastically build and work a potential business network
- ✓ You are able to confidently present and deliver a quality client presentation
- ✓ Are willing to follow up potential clients and business contacts
- ✓ You may have already have some existing clients or consider converting your employer to a client
- ✓ You have a strong desire to leave corporatelif behind and 'make it' long-term as a CFO On-Call advisor/consultant

## CFO ON-CALL PROVIDES:

Best marketing - Best SEO - More high ranking keywords = More Leads

Genuine high level of client enquiries - Appointments made for you

Don't pay 40% of your earnings - 70/30 fee split

You get access to an Exclusive Client Start Up Process where...

You convert more clients - They pay upfront - No waiting for payment

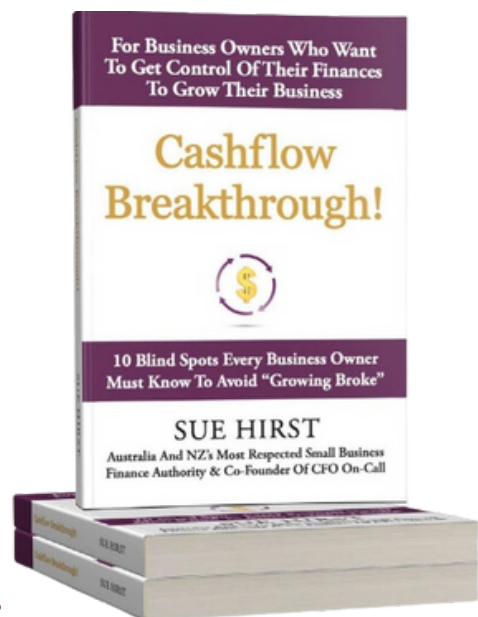
Support - one-on-one from someone who's been there and done it!

Process for marketing, selling and delivering CFO Services

*(accountants love processes!)*

**Get the financial  
information you need to  
shed light on your  
financial blind spots,  
improve your efficiency,  
and bolster your cashflow.**

**ORDER NOW**



SUE HIRST

## WHAT SOFTWARE DOES CFO ON CALL OFFER:



A user-friendly online inventory management system for manufacturers, wholesalers, and distributors, providing crucial insights for confident business scaling.

Harness office and mobile solutions for seamless processes and a fully connected business, enabling greater productivity and superior service for increased profitability.



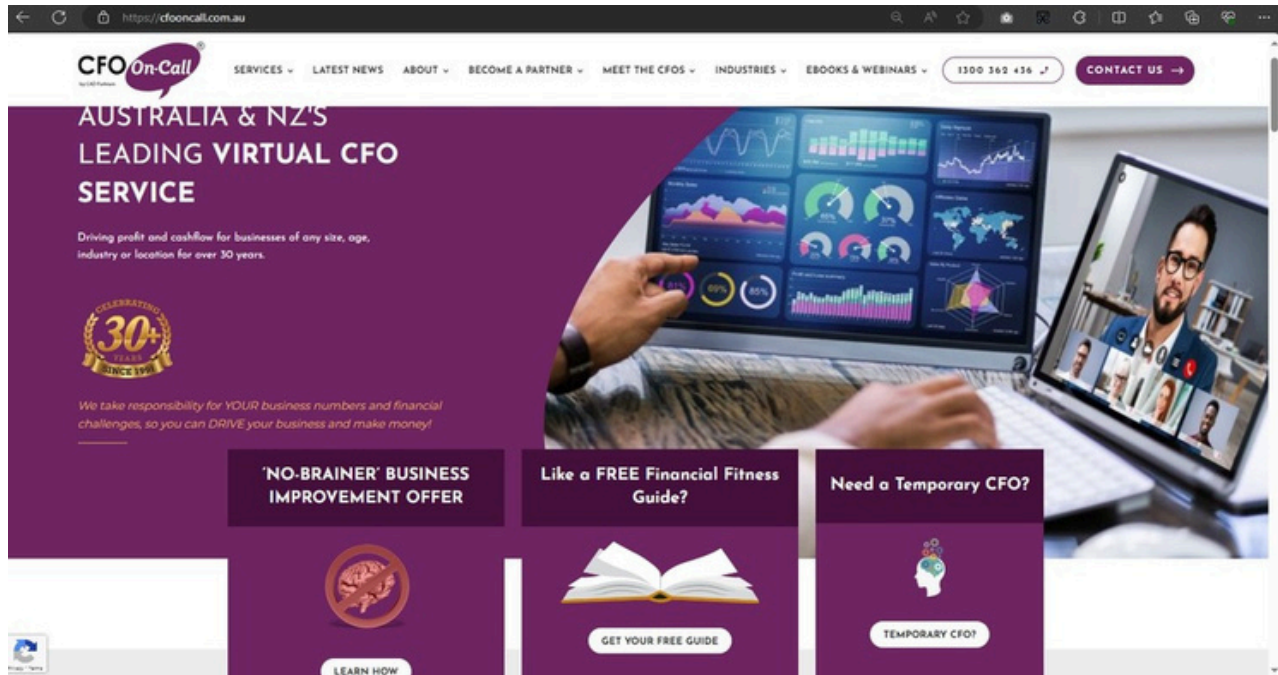
Xero, an online accounting software, streamlines business operations by facilitating staff payments, cash flow management, and various tasks such as invoicing, expense claims, and time tracking in a user-friendly interface.



enableHR simplifies HR and WHS management, empowering businesses of all sizes to efficiently meet compliance challenges with support from specialist workplace lawyers.



# CFO ON-CALL WEBSITE



## OUR LOCATIONS



Sydney  
Melbourne  
Perth  
Brisbane  
Newcastle  
Adelaide



## SOME OF OUR CFOs and Virtual CFOs On-Call



**AARON HUBKA**  
VIRTUALCFO - MELBOURNE



**ANDREW FREE**  
VIRTUALCFO - NEWCASTLE NSW



**ASHLEY ARNOTT**  
VIRTUALCFO - FRANKSTON VICTORIA



**CON KOUDSY**  
VIRTUAL CFO - SYDNEY



**LIANNE GROVE**  
VIRTUAL CFO - PERTH



**MATT BLISS**  
VIRTUAL CFO - WELLINGTON NZ



**MICHAEL BEVIß**  
VIRTUAL CFO - ADELAIDE



**RANGAN VAITHI**  
VIRTUAL CFO - SYDNEY



**ARTHUR BORTZ**  
VIRTUAL CFO - MELBOURNE



**NEHA MALHOTRA**  
VIRTUAL CFO - MELBOURNE



**ROB LANCUBA**  
VIRTUAL CFO - SYDNEY



**STEPHEN HUNT**  
VIRTUAL CFO - KERI KERI NZ

## SAMPLE REVIEWS

Here are some reviews which our partners have received.

We have an understanding of our business like never before! We now have accurate Key Performance Indicators (KPIs) which means we can make informed business decisions and grow the company profitably at every turn.

**Warwick Glendenning, CEO**

Power Systems Consultants Group

If you are working frantically in your business, it really doesn't matter how busy you are – it is crucial to take the time to work on your business to ensure that all the effort is worthwhile. Our CFO On-Call is invaluable in guiding and supporting us around financial hazards.

**Lesley, Peter & Joshua Turner, Directors**

Flairs Jewellery

I can't speak highly enough of John and CFO On-Call. I would recommend them to any business owner because we don't know about this stuff. We don't have the time to do an accounting degree, but we need someone to guide us. I'm now living the dream – running the business remotely! The internet has freed me up to work remotely. Everything is in the cloud now and CFO On-Call plays a big part as my Virtual CFO!

Michael Brewitt, Director

Velocity Electrical, **Construction**

We now have the useful financial information we need to make informed financial and business decisions at the right time. His input has led to a 27% improvement in profitability.

**Greg Jacques, General Manager**

Nolans Transport

My CFO On-Call Michael came in and implemented a range of new systems and reports that we still use today. I now have a P&L which I can read and actually understand! Michael's great at putting things into layman's terms and helping us make sense of complex concepts. And his value doesn't just stop at numbers – due to his commercial background he has also been a great asset to us in terms of recruitment and managing staff.

**Jenny March, Owner**

ATM2GO

Before engaging CFO On-Call, the bank wouldn't support me, so debtor financing was my only option. CFO On-Call set up our new management reporting and forecasting, and the bank changed their mind. Since then, we have grown total revenue by 17%, increased gross margins from 17% to 37% and improved debtor days by 36%. We're going from strength to strength!

**Peter Deverall, CEO**

Safa Glass, Brisbane

## SAMPLE REVIEWS

Here are some reviews which our partners have received.

"He has taken the pressure off me. Net profit is growing and I'm confident our strategy can be implemented and turned into reality. I'm now living the dream - running the business remotely."



**Mike Brewill**  
CEO Velocity Electrical

"We have the useful information we need to make the financial and business decisions at the right time. Our CFO's input has led to a 27% improvement in profitability."



**Greg Jaques**  
GM Nolans Transport

"I've now got the confidence to grow the business. I've got lots of ideas about business direction and his input is great. Our CFO On-Call is a valuable asset who helps with the planning and ensures cost effectiveness."



**Francis Vigliante**  
CEO of BRI

"We've already made improvements of six figures! Our CFO On-Call's experience has made a huge difference to our bottom line. He's streamlined our processes and efficiency to better use our systems and people."



**Rodney Frost**  
Group GM Iamson Paragon Group.

# PURPOSE OF DUE DILIGENCE

The purpose of this Due Diligence Process is to ensure there's a strong mutual fit before we embark on a partnership. It's an opportunity to clarify your goals, explore how CFO On Call can help you achieve them, and gain first-hand insight into our systems and support.

We want you to be fully prepared before launching your own accounting firm, which is why we encourage you to have both a business plan and a marketing strategy ready. This process offers a deeper understanding of our business model and what you can expect as one of our valued partners.

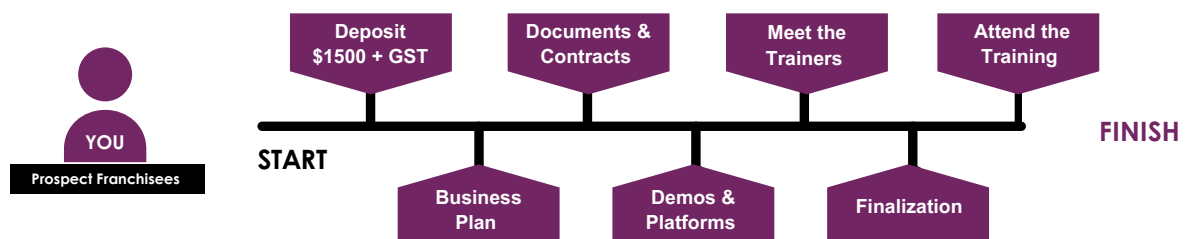
To begin, we ask for a modest commitment in the form of a **\$1,500 + GST deposit**. This allows you to commence the Due Diligence process and access the full experience we offer.

## With this deposit, you will get to do the following:

- ✓ See a demo of CFO On Call platforms and systems
- ✓ Read the franchise agreement or contract
- ✓ Meet with our director, Jose Alguera-Lara, for business and marketing advice
- ✓ Speak with trainers and ask them about the training process
- ✓ Speak with existing franchisees/partners and ask for feedback
- ✓ Receive our branding guidelines and price list guide

The due diligence process will take at least 3-8 weeks and should you wish not to proceed then we will refund your deposit of **\$1300 + GST. (\$200 is for bankruptcy check, police checks, admin fees)**

## DUE DILIGENCE TIMELINE







## FREQUENTLY ASKED QUESTIONS

### **My cash flow is a bit tight... how can I pay the fees of a CFO?**

We can help you identify and transfer funds sitting in various places into your business bank account swiftly, enabling smoother expense management and more efficient business growth.

### **How much does a Virtual CFO cost?**

Virtual CFO charges vary based on business objectives and size, but a skilled Virtual CFO can deliver significant returns in improved profit, cash flow, and business value by swiftly identifying and implementing solutions without constant supervision from the business owner.

### **Why do I need a Virtual CFO when I have an accountant?**

CFO services require specialised expertise and an intimate understanding of the business, which is typically gained through years of real-world experience across various industries, unlike tax or compliance accountants who may lack this firsthand commercial experience.

### **How do CFO services help with Business Growth Guidance?**

Business growth presents challenges beyond increased sales, often requiring additional resources and careful cash management. A Virtual CFO can play a crucial role in securing external funding, facilitating communication with lenders or investors, and ensuring the business is positioned as an attractive opportunity for investment.

### **When is the right time to hire a virtual CFO?**

Hiring a virtual CFO benefits businesses at any stage, from setting up processes for startups to organizing financials for established companies and maximizing value for those planning to sell. Whether aiming to streamline operations, fuel growth, or enhance exit strategies, a virtual CFO is invaluable in boosting overall company value.

### **Aren't the reports from my accounting system enough to guide me?**

Relying solely on technology for financial insights can be risky, as human errors may go undetected, potentially disrupting cash flow and profits. A virtual CFO offers customised reporting and integration with existing technology, ensuring greater outcomes and eliminating duplicate expenses. Partnering with a seasoned professional provides a proactive approach to improving sales and maximizing business efficiency.

### **Which industries does CFO On-Call's virtual CFO specialise in?**

At CFO On-Call, we specialise in assisting small and medium-sized businesses across various industries, including printing and manufacturing, trades, mechanical engineering, freight transport and logistics, building and construction, wholesale and distribution, high tech, professional services, veterinary practices, automotive businesses, and more. Our focus is on enhancing systems, processes, and profit margins, tailored specifically to each industry, to provide the most efficient virtual CFO services for your business niche.

### **Why choose CFO On-Call's virtual CFOs over other outsourced CFO's?**

CFO On-Call, the largest part-time and on-call CFO services provider in Australia and New Zealand, offers experienced CFOs with local expertise to make tangible improvements to your business, enhancing sales, profit, cash flow, and overall value, while providing hands-on support and clear insights into your numbers.

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### **Why is a systemised business worth more than one that isn't systemised?**

New business owners seek confidence in the smooth operation of their venture, and systemisation plays a crucial role in due diligence. Inefficient systems may lead to discounts sought by potential owners, highlighting the importance of preserving knowledge and minimizing reinvention.

### **Doesn't just selling more automatically improve profitability?**

Many business owners focus lots of attention on making sales. This is great, but if they're not profitable sales, the benefit can be lost by the time any of it gets to the bottom line. Not enough focus is given to cost and overheads management. Often more focus on these can have a much bigger impact than selling more!



# TESTIMONIALS

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CFO On Call®

## WHAT OUR CLIENTS SAY About Us

**Ashley Arnott**  
*CFO On-call Partner*  
★★★★★

"I have been a CFO On-Call partner for over 9 years. In that time, I've never missed any of my kids' school events. CFO On-Call has provided me with flexibility to be able to watch my kids grow up, while still working full time. I've also been able to be involved with a wide range of exciting industries and people."



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CFO On Call®

## WHAT OUR CLIENTS SAY About Us

**Scott Goffage**  
*CFO On-call Partner*  
★★★★★

"One of the benefits of being a CFO On-Call Partner is the continual variety, interest, and challenge of working with a number of businesses and their owners in a variety of industries. I'm also able to identify the key issues in their business and help them to address these, which then will result in improved profit and cashflow."



## MARKETING CONTRIBUTION

- Monthly Fee: \$500 + GST
- Purpose:
  - This fee supports collective marketing efforts to boost brand awareness and drive business to all franchises.
  - Leverage head office's expertise and resources in marketing to attract and retain clients.

## WHAT IS THE COST?

In relation to costs, please note that to start any business, there are development, setup and marketing costs. This would be your business in partnership with us so there is a moderate upfront one off cost of \$29,000 + GST

### Royalty Structure:

- 70/30 Split:
  - Franchisee: 70%
  - Head Office: 30%
- This generous split ensures that you, as the franchisee, retain the majority of your earnings, enabling you to grow and sustain your business effectively.

### And Technology fee:

- \$120 + GST per month

## WHERE TO FROM HERE?

The next step is to submit an Expression of Interest on our website. Text a message for a call back or send an email.

# GET IN TOUCH

Complete the short form below to express your interest and schedule an initial conversation with CFO On-Call.

**What is your name?**

Please enter your name here

**What is your best contact email?**

Please enter your email here

**What is your best contact number?**

Please enter your phone number here

**Location**

State / Province

Country

**Tell us about your background and why you're interested in becoming a CFO On-Call.**

Upload Your CV (Optional at this point)

**Please upload your CV here**

Drop files here or

Select files

Accepted file types: docx, doc, pdf, Max. file size: 368 MB, Max. files: 6.

**SUBMIT**

**SCAN ME**





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LEADING VIRTUAL CFO SERVICE