

We're delighted to introduce ourselves.

With 55 years of combined experience we provide innovative CFO services to individuals, families, trusts, estates and professional services firms — helping manage your finances so you can focus on what you do best. We save you time, money and stress.

Our goal is your peace of mind. We can provide weekly, monthly or quarterly support, helping you de-stress the management of your finances:

- Listen and evaluate your financial situation and goals, business or personal
- Help you create a budget that's easy to understand and follow
- · Maintain monthly accounts, pay bills and provide timely and accurate reporting
- Pay bills and provide daily money management services
- Get and keep your QuickBooks/Quicken and other financial files in order
- Ensure that data your tax specialist needs is accurately collected and presented
- · Coordinate with your other trusted advisors to ensure your plans are being actualized
- Provide friendly, caring support and empathy as well as expertise

So how are we different from:

- CPAs? We don't do tax returns, but your CPA will love how organized you'll be with our help.
- Financial Planners? We don't provide investment guidance; instead we can work with your advisors to ensure one clear financial picture for you.

We'd love to meet you. Please contact us with your accounting questions.

Andrew R. Cohen

Robert J. Hovden

Innovative CFO Services That Make Life Easier

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