

Outsourced CFO for a Real Estate Development Firm

Completing 3 years of work in 4 months

At a glance

This client approached us feeling stressed out about their finances and lack of organization. They had dozens of investors and needed to send them detailed reports on a frequent basis.

Key metrics



35

Investments cleaned and organized



\$30MM

Portfolio value



20

Hours saved per month



Outsourced CFO



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CHALLENGES



The client had no bookkeeping and was keeping track of their dozens of properties separately in Excel. There was no system, business plan, or goal structure. Additionally, there was no easy way to read reports or create visuals to help them understand their business. They had dozens of investments and even more investors who all required detailed reports on their investments.

SOLUTIONS



Fox & Partners stepped in and provided a calm and organized presence. Within months we had reconciled thousands of transactions, created clear reports, and allowed them to feel a sense of ease while providing investors with what they needed.



Investor Reports



Business Planning



Financial Reporting

RESULTS



1

Ability to Exhale

Installed systems to put processes and documentation in place, backed up all important documents to the cloud, took the burden of financial reporting off of the client's plate, and had accurate tax reporting

2

Increased Gross and Net Income

Put a business infrastructure in place to allow for increased funding and project opportunities

3

Scaleability

Using the systems mentioned in benefit #1, we were able to build the foundation for this client to scale.