

CFO Services for a large, urban real estate development firm.

Providing the communication, controls and calm that only an experienced CFO can bring

At a glance

Client brought us on to relieve the frustration of spending too much time creating financial reports and not having proper controls and communication from their in-house accounting team. The CEO and investors needed comprehensive reporting and quick access to KPIs.

Key metrics



\$60K

Annual cost savings



500

Hours saved a year



12

Property reports created



Outsourced CFO



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CHALLENGES



Before coming onboard, our client was using AppFolio, QuickBooks, and Excel to keep track of their real estate holdings. However, these different software's were not talking to each other which lead to inaccurate reporting. This software conflict also lead to more manual work for employees to take on while costing the company both time and money. The client's accounting team also struggled with controls and communication.

SOLUTIONS



Our solution was to create automated processes that enabled AppFolio and QuickBooks to become integrated. This solution allowed the client to have more time and have easy access to comprehensive reports. We also created financial controls, processes and weekly meetings to improve the accounting team's communication and performance.



**Software
Integration**



CFO Services



**Custom
Reporting**

RESULTS



1

Increased Accounting Team Performance

After discussing and creating better accounting controls the company's financial outlook improved significantly and the accounting team saved hours of un-necessary work each week.

2

Easy to Use Custom Financial Models

Access to highly detailed and up-to-date reports

3

Increased communication and confidence

The weekly meetings, implemented controls and comprehensive reports improved internal and external communication and confidence.