



Your Complete Outsourced Finance Department

Expert financial leadership, technology-driven operations, and radical transparency — delivering the full back-office solution for about the cost of a bookkeeper.

PROSPERACFO.COM • 888.500.3450 • GROWTH@PROSPERACFO.COM

WHAT WE DELIVER

Your Finance Team — Expert, Scalable, and Cost-Effective

Why invest in building an entire in-house finance department when you can access the expertise you need now? Prospera delivers CFO-level strategy, Controller precision, and dependable accounting — all with dual controls and appropriate oversight of every accounting function.

Fractional CFO

STRATEGIC GROWTH PARTNER

- ✓ Strategic plans and forecasts to drive growth
- ✓ Budgets and scenario modeling for uncertainty
- ✓ Cash flow and capital optimization
- ✓ Profitability analysis and margin improvement
- ✓ Regular meetings to review results and update strategies
- ✓ Board- and investor-ready financial reports

Fractional Controller

FINANCIAL PRECISION

- ✓ Oversee daily accounting and team performance
- ✓ Analyze financial statements for actionable insights
- ✓ GAAP-compliant, audit-ready financials
- ✓ Treasury and cash flow management
- ✓ Streamline systems and controls for efficiency
- ✓ Coordinate audits and tax preparation

Staff Accountants

SEAMLESS DAILY OPERATIONS

- ✓ Accounts payable, receivable, and payroll
- ✓ Bank, credit card, and inventory reconciliations
- ✓ Sales tax filings and audit support
- ✓ Accurate month-end close and reporting
- ✓ Budgeting and forecasting support

HR & Payroll

STREAMLINED OPERATIONS

- ✓ Integrated HR and payroll platform (Eddy HR)
- ✓ Hiring, onboarding, and benefits management
- ✓ Workers' comp integrated into payroll
- ✓ Professional HR guidance on demand
- ✓ 401K, health insurance, and background checks

Radical Transparency Into Your Business

We ensure dual controls and appropriate oversight of all accounting functions with regular, ongoing meetings to review results and update execution strategies to improve business results. Our comprehensive approach strengthens financial performance, improves decision-making, and positions your business for sustainable growth.

OUR INTEGRATED PLATFORM

Technology Solutions for Efficient Financial Operations

We bring best-in-class technology solutions to create efficient financial operations and radical transparency so you can make better decisions. Each platform is expertly integrated to provide a seamless, unified back-office experience.



QuickBooks

Cloud-based accounting with real-time visibility into your financial performance



Eddy HR

All-in-one HR & payroll for hiring, onboarding, and employee management



Ramp

Spend management and expense cards with built-in controls and AP automation



CorpNet

Entity setup, compliance filings, and ongoing regulatory requirements



ROK Lending

Access to lending — equipment finance, lines of credit, and SBA solutions



Prospera Intelligence

AI-powered automation, data insights, and intelligent reporting



DUAL CONTROLS

Segregation of duties and oversight built into every process



REAL-TIME DATA

Cloud-connected systems for instant visibility



CONNECTED ECOSYSTEM

Key platforms working together for streamlined operations



FINANCIAL CLARITY

Organization, structure, and process — bringing transparency to your finances

Optional Add-On Services

Expand your back office with additional integrated platforms — all set up and managed by our team:

401Go — 401K with Safe Harbor & ROTH • **Simply Insured** — Health insurance • **Checkr** — Background checks • **SmartPay** — Workers' comp in payroll • **Cash Flow Forecasting** — Custom reporting

System costs are determined and paid directly to each vendor. Prospera supports the setup and ongoing management of all integrated systems.

GETTING STARTED

How We Work

1

Discovery Meeting

We learn about your business, operations, pain points, and growth goals to design the right solution.

2

Onboarding & Setup

Our team configures your tech stack, migrates data, and integrates all platforms for seamless launch.

3

Ongoing Operations

Daily bookkeeping, payroll, reconciliations, and reporting run in the background — you focus on growth.

4

Strategy Meetings

Your CFO and Controller present financials, review KPIs, and collaborate on execution strategies.

INVESTMENT

Transparent, Custom-Quoted Pricing

Every business is different. We build a custom scope and quote based on your actual needs — not a one-size-fits-all package. You'll always know exactly what you're paying for.



Custom Quote

We assess your operations and build a scope-of-work with hourly rates for each role, tailored to your needs.



Line-Item Billing

Every invoice includes detailed breakdowns by role and hours — complete visibility into where every dollar goes.



Floor Amount

A minimum monthly engagement keeps your team staffed and operations running — with flexibility to scale.

How It Works

- 1 Discovery & Scope** — We learn your business and define the roles and hours you need.
- 2 Transparent Quote** — You receive a clear proposal with hourly rates per role and estimated hours.
- 3 Detailed Invoicing** — Every bill is line-itemized by role and hours worked.
- 4 Flex & Scale** — Adjust scope up or down as your needs evolve.

Your Complete Finance Department — For About the Cost of a Bookkeeper

Most small businesses can only afford a bookkeeper. With Prospera, you get a complete finance department — CFO, Controller, Staff Accountants, and HR — all powered by integrated technology and delivered with the oversight and controls of a professionally managed back office. One team. One relationship. Transparent pricing with clear visibility into your spend.

THE PROSPERA DIFFERENCE

Why Businesses Choose Prospera

01

Cost-Effective Expertise

CFO-level strategy, Controller precision, and staff reliability — without the in-house price tag. Predictable costs with no surprises.

02

Comprehensive Support

From strategic vision to daily operations, we cover it all. One team, one relationship, one integrated solution for your entire back office.

03

Trusted Accuracy

GAAP-compliant, tax-ready, and audit-prepared financials with dual controls ensuring every transaction has appropriate oversight.

04

Scalable Efficiency

Processes and technology that evolve with your business. As you grow, your back office grows with you — seamlessly.

05

Confident Decisions

Clear financial insights and radical transparency give you the data to drive smarter outcomes and improve business results.

06

Partnership Ecosystem

Lending, HR, entity compliance, spend management, and AI tools — all integrated and managed by our team.



Ready to Transform Your Back Office?

Schedule your free discovery meeting today.

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