



THE MILLENNIAL

Virtual CFO Service Guide

About The Millennial

Revolutionizing Accounting with Virtual CFO and Digitalization

Since our establishment in May 2021, we have been serving clients all over Pune with our innovative approach. The Millennial offers a dynamic experience by combining expertise, skills, and resources. We go beyond traditional accounting by providing Virtual CFO services, including cash flow management, business tax planning, and financial forecasting. Embracing our distributed nature, we excel at helping clients overcome unique financial and technological challenges. Technology is at the heart of our operations, as we actively seek cutting-edge tech to enhance client experience and deliver remarkable results.





- Businesses often grow to a point where they need professional financial advice but can't afford a fulltime CFO or controller.
- The cost of hiring a full-time CFO can range from Rs 30,00,000 to over Rs 1,00,00,000 per year, plus bonuses and benefits.
- Our Virtual CFO Services provide you with an experienced team at a fraction of that cost.



Here's what makes us different.

1

We offer fee that best suits you viz hourly, monthly or project based.

2

We bundle our services.

3

You only pay for exactly what you want.

4

We Teach you Profit-Focused accounting.

5

We utilize technology to its fullest.



Levels of service



And Our Customizable Menu Of Services....



WHAT'S INCLUDED

A dedicated team of financial experts to guide your business to success*

Company-wide forecasting and KPIs

Regular dedicated meetings (weekly, bimonthly or monthly)

A main point of contact to streamline your experience.

A dedicated onboarding process.

Attendance at your leadership meetings*

End-of-month close

Financial statements

Unlimited Online support

*Depending on the service level you choose and any customizable menu of services.



EXPLORE OUR CUSTOMIZABLE CUSTOMIZABLE MENU OF SERVICES

1. Paying Bills (Accounts Payable)
2. Invoicing Clients (Accounts Receivable)
3. Payroll Management
4. Cash Flow Management
5. Business and Personal Tax Returns



Our Virtual CFO Service will be a perfect fit for fit for you if.,

1

Your business has reached over 10 Crore in annual revenue.

2

You need strategic support, at an affordable rate.

3

You're a growing business that needs needs professional financial advice but but can't afford a full-time CFO or controller.

4

You're looking to replace an existing CFO and don't need an on-site CFO on a daily basis.



Key Differences in Service Levels

VCFO Level

More hands-on involvement-Weekly meetings for updates

Actively recommends and aids decision-making-Focus on future planning with KPIs and forecasting

Proactively brings insights and suggestions

When to opt-When you need a financial partner who can handle it all: customized reports, third-party communications, compensation plans, and holistic business insights.

Controller Level

Offers advice, leaves final decisions to you. Meetings as needed, less frequent than VCFO

Focuses on strategic financial planning. Acts as a financial advisor with balanced guidance.

When to opt-You are good with more macro level details and implementing our recommendations

Transactional Level

Primarily analyzes past financial data.-Reactive approach.

Monthly meetings for financial discussions.-Recommendations based on historical events.

Provides insights into what has already happened.

When to opt - you want clean financials and an expert sounding board to discuss them.



TABLE OF SERVICES

| | Transactional | Controller | Virtual CFO |
|--------------------------------------|--------------------|-----------------|---------------|
| Typical Client Size | Under 10 Employees | 10-20 Employees | 20+ Employees |
| Service Description | Reactive | Proactive | Strategic |
| Onboarding | 4 Weeks | 6 Weeks | 8 Weeks |
| Month-End Close | Yes | Yes | Yes |
| Financial Statements | Yes | Yes | Yes |
| Scheduled Meetings | Upto 1X/Month | Upto 2X/Month | Upto 6X/Month |
| Online Support | Unlimited | Unlimited | Unlimited |
| Company Wide KPIs | No | Yes | Yes |
| 12 Month Forecasting | No | Yes | Yes |
| Revenue Recognition | No | Yes | Yes |
| Incentive Plans | No | No | Yes |
| Performance by Project | No | No | Yes |
| Team Member Performance | No | No | Yes |
| Department Performance | No | No | Yes |
| Customized Department Reports | No | No | Yes |
| Bank Relationships | No | No | Yes |
| Director Meeting | No | No | Yes |
| Resource Planning | No | No | Yes |
| Individual Tax Return | Optional | Optional | Optional |
| Business Tax Return | Optional | Optional | Optional |
| Other Business Tax Returns | Optional | Optional | Optional |
| Tax Planning/Projections | Optional | Optional | Optional |



OUR PRICING POLICY IS FLEXIBLE.

We Listen to Your Needs

We learn what you need and then use specific criteria to itemize an all-encompassing price.

No Hidden Costs

There are no hidden costs or miscellaneous fees. Your price won't change, unless you choose to change service levels or Choose from our customizable menu of services.

Flexible pricing

We price based on need hourly, monthly or project based.

An Extension of Your Team

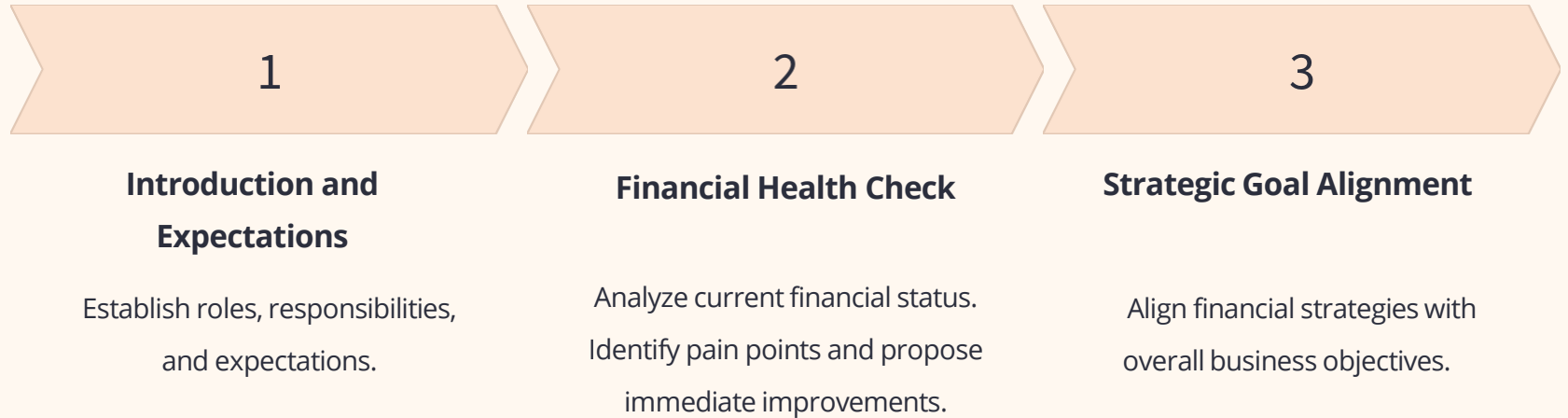
We're an extension of your team, and we want you to treat us that way! Your employees don't increase their rates, and they don't charge you every time you ask them a question. Neither will we.



Virtual CFO Onboarding Process

Elevate Your Financial Strategy

Phase 1: Initial Engagement (Weeks 1-4)



Virtual CFO Onboarding Process

Phase 2: Monthly Deep Dive (Ongoing)



Pipeline and Sales Strategy Review

Assess sales pipeline for revenue optimization.

Real-time Cash Flow Management

Implement real-time cash flow practices.

Dynamic Forecasting

Enhance forecasting with adaptive models.

Continuous Project Monitoring

Establish a real-time project monitoring system.

Next Steps

1

Interactive Session

2

Collaboration Kick-off





Virtual CFO Service

1

Engaging Leadership Council

Join our weekly leadership council for engaging discussions on financial insights, project updates, and the latest cash position. Your input is crucial for impactful and enjoyable gatherings.

2

Versatile Skill Set

- Navigating Banking Relations
- Team Incentive Programs
- Scalable Analysis Reports
- Micro Budgeting Mastery

We bring a versatile skill set to the table, providing comprehensive financial leadership and support.



Controller Service

1

Forecast Updates

This service involves at least two meetings per month with leadership: one dedicated to forecast updates, and one to the prior month's performance and new alignment of the goals that we collectively set.

2

Team Composition

Your team will consist of a controller, a senior accountant, and a tax specialist, ensuring comprehensive financial analysis and decision-making support.

3

Both the Virtual CFO and Controller service offer forecasting. The key difference is that the Controller service provides recommendations while the VCFO enacts them on your behalf.



Transactional Service

1

Monthly Meetings

The Transactional Service includes monthly financial discussions, ensuring regular insights and support for strategic decision-making.

2

Compliance-Driven Approach

Strictly compliance driven, this service is best for small companies that want high and tight financials they can actually use – and a monthly sounding board to discuss them.





Customizable Menu of Services:



Accounts Payable Management

We expertly manage and code accounts payable, ensuring timely payment of bills, including credit cards. This comprehensive service comes with our included Cash Flow Management.



Accounts Receivable Management

Our streamlined invoicing process ensures meticulous review of customer invoices before dispatch and prompt recording of payments, supporting effective receivables management.



Customizable Menu of Services:



Cash Flow Management


We ensure a strong handle on short-term cash position through a 4-8 week cash flow forecaster and regular meetings to discuss cash ebbs and flows.



Payroll Management

We ensure payroll integrity by managing it through third-party providers, updating employee data, and managing state IDs, prioritizing confidentiality and accuracy.





Customizable Menu of Services: Services:



Business & Personal Tax Returns

Stay one step ahead of your tax liabilities: Our strategic forecasting and goal planning ensure we have a clear understanding of your year-end tax obligations. Each month, we proactively set aside funds in a tax savings account based on our ongoing assessment, so you never have to worry about unexpected tax bills.



Contact Us

Get in touch with us for questions, feedback, or to inquire about our services. Fill out the contact form or call us.

For any inquiries, please contact us at:

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Contact us now to schedule a free 1-hour consultation and learn how we can help your business succeed!

