



# ADVISORY AND INSIGHTS THAT TAKE YOU FORWARD

Advisory solutions for proactive business owners  
who have **outgrown** the traditional CPA relationship.

There are accountants who focus on historical data. Then there are accountants and advisors who focus on **tomorrow**. Stop looking backwards and embrace how strategic and tax-smart advisory services can propel your business to a better financial future. Elevate your potential with Alloy Silverstein Accountants and Advisors.

## Business Advisory and Growth Consulting

- Business Plans and Implementation
- Organizational Management Consulting
- Succession and Transition Planning
- Mergers and Acquisitions
- Company Privatization
- Business Contingency & Disaster Recovery
- International Expansion
- Business Valuations
- Family Business Consulting
- Tax-Smart guidance throughout the stages of the Business Life Cycle:
  - *Startup Mentorship*
  - *Growth Phase – Rapid or Incremental*
  - *Expansion Opportunities*
  - *Maturity & Maintaining Profitability*
  - *Exit Strategies*

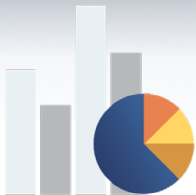
## Insights, Outsourcing and Process Improvement

- Virtual or Fractional CFO
- Key Performance Indicator (KPI) Monitoring
- Virtual Dashboards
- Comprehensive Reporting
- Forecasting and Cash Flow
- Budgeting and Profitability Analysis
- Custom Tech Stack Building
- Enhanced Fraud Prevention Controls
- Monthly, Quarterly, or Semi-Annual Advisor Meetings for Strategic Business Planning
- Outsourcing and/or Automation of key Accounting and Bookkeeping Tasks:
  - *Electronic A/P and A/R*
  - *Reconciliations & Monthly Close*
  - *Write-Ups*
  - *Payroll Processing*



# WHERE DO YOU WANT TO BE

## 5, 10, 15 YEARS FROM NOW?



Together with an Alloy Silverstein advisor, you can align your business plan with actionable insights that help you reach—and *exceed*—your long-term goals.

Whether you are just starting a new business or you're ready to take your operations and profitability to the next level, **Alloy Silverstein's Advisory and Insights** can guide you towards the success you envision.

Our experienced professionals will discuss your goals, deep dive into your financials, setup KPIs on your most important metrics, and monitor the economic trends in order to equip you with the tools and information needed to make **smarter business decisions**.

### Industry Experience since 1959

- Agriculture
- Amusement
- Cannabis
- Construction
- Food & Beverage
- Health Care
- Hospitality
- Legal
- Manufacturing
- Not-for-Profit
- Professional Athletes
- Professional Services
- Real Estate
- Retail

### FOUR KEY ADVISORY AREAS:



#### STARTUP

- New Entity Formation
- Business Plan & Goal Setting
- Financing Assistance
- Bookkeeping & App Setup
- Identify KPI Metrics



#### GROWTH

- Mergers & Acquisitions
- Expansion
- Contract Reviews
- Forecasting & Projections
- Tax Planning



#### IMPROVEMENT

- Outsourcing & Automation
- Fraud Controls
- Contingency Planning
- Budgeting & Cash Flow
- Tracking KPI Dashboards



#### EXIT

- Succession Planning
- Transition Advisory
- Privatization
- Business Valuations
- Sale of Business

Schedule an introductory meeting with **Angela Venti** at 856.685.6728 or [AVenti@alloysilverstein.com](mailto:AVenti@alloysilverstein.com).

