Finanzap

FOR CPAS

When to refer a client to FP&A: 5 signs

Questions that go beyond the close and the return, and who can help with them every month.

1 **Profitable, but always short of cash.**
They ask why the bank balance does not match the profit.

2 **Sales growing, gross profit flat.**
More work, the same money: price, mix or costs are moving.

3 **Big decisions without a forecast.**
A hire, a price change, a loan or a new location, decided by feel.

4 **A bank or lender asking for projections.**
They need a budget and a cash forecast they can defend.

5 **The same questions come back every quarter.**
Margin, cash, pricing: asked again, with no time to go deep.

> **How we work with you.** We start from the books you close and stop at pre-tax profit. No tax work, no bookkeeping, no parallel accounting. Your client stays your client, and we keep you in the loop on anything that touches the books.