

Business Need	Type of Business	Revenues	Location	Solution Delivered	Post-Solution Work
<b>Financial Models</b>					
	Distributor	\$1.2 mil	Midwest	Cash flow model	CEO still uses the model
	Real estate broker	\$250 k	Midwest	Cash flow model	One-and-done solution
	Property sales & mngmnt	Not avail	Midwest	Cash flow model	One-and-done solution
	IT Sales	\$25 mil	Midwest	Cash flow model	Model updated for changed conditions
	Manufacturer	\$1 mil	Midwest	Cash flow model	CEO uses the model; calls with questions
	Manufacturer	\$1 mil	Midwest	Cash flow model	CEO stays in touch with questions
	E-Commerce	Start-up	Midwest	Cash flow model	Monitored cash burn; sold to Getty Images
	Commercial printer	\$1.5 mil	Midwest	"Forward-looking financial model (PL, CF, BS)"	CEO still uses the model
	Ecological contractor	\$3 mil	Midwest	"Forward-looking financial model (PL, CF, BS)"	Controller still uses the model
	Architectural services	\$1.5 mil	Midwest	"Forward-looking financial model (PL, CF, BS)"	Financial reviews for 8 years
	Food services	\$26 mil	Midwest	"Forward-looking financial model (PL, CF, BS)"	CEO stays in touch with questions
	Distributor; education	\$32 mil	Midwest	"Forward-looking financial model (PL, CF, BS)"	Continuing contact with CEO
	Salon and Spa	\$400 k	Midwest	"Forward-looking financial model (PL, CF, BS)"	One-and-done solution
	Legal services	\$3.5 mil	Midwest	"Forward-looking financial model (PL, CF, BS)"	Analysis package for valuation; sold to Axion
	Food services	\$16 mil	Midwest	"Forward-looking financial model (PL, CF, BS)"	Acting as CFO on 3 occasions; chain sold
	Pharmaceutical	Start-up	Midwest	"Forward-looking financial model (PL, CF, BS)"	One-and-done solution
	Real estate services	\$3 mil	West	"Forward-looking financial model (PL, CF, BS)"	One-and-done solution

Financial Direction					
	Campus lecture productions	\$3 mil	Midwest	One-on-One consulting	CEO stays in touch with questions
	Lighting contractor	\$1.2 mil	Midwest	One-on-One consulting	CEO stays in touch with questions
	Legal services	\$1.2 mil	Midwest	One-on-One consulting	CEO stays in touch with questions
	Real estate services	\$1 mil	Midwest	One-on-One consulting	One-and-done solution
	Engineering services	\$2 mil	Midwest	One-on-One consulting	One-and-done solution
	Computer sales & service	\$1.2 mil	Midwest	One-on-One consulting	Continuing contact with CEO
	Lawn maintenance	\$1.2 mil	Midwest	One-on-One consulting	Continuing contact with CEO
	HVAC contractor	Not avail	Midwest	One-on-One consulting	One-and-done solution
	General contractor	\$700 k	Midwest	One-on-One consulting	Continuing contact with CEO
	Manufacturer	\$4 mil	West	One-on-One consulting	Continuing contact with CEO

Financial Analyses					
	Business broker	Not applic	Midwest	Analysis packages for valuation purposes	Ongoing analysis work for 8 years
	Legal services	Not applic	Midwest	Damages model to settle litigation	One-and-done solution
	Distribution	Not applic	Midwest	Cash flow analysis of acquisition candidate	One-and-done solution
	Roofing contractor	\$7 mil	Midwest	One-on-One consulting	One-and-done solution
	Insulation contractor	\$6 mil	Midwest	One-on-One consulting	Continuing contact with CEO
	Private Equity Group	Not applic	Midwest	Carve-out analysis of acquisition segment	One-and-done solution
	Business broker	Not applic	Midwest	Analysis packages for valuation purposes	Continuing contact with CEO

## Financial Reviews

Distributor	\$5 mil	Midwest	Analytic model for margins and pricing	CEO still uses the model
Distributor	\$1.2 mil	Midwest	Recommended process improvements	CEO stays in touch with questions
Food services	Not avail	Midwest	One-on-One consulting	One-and-done solution
Property rehabber	\$33 mil	Midwest	Analysis and discussion of findings	One-and-done solution
Medical practice	\$2.5 mil	Northeast	Revised financial reporting format	Fielded financial management questions
Manufacturing & Distribution	\$15 mil	Southeast	New management tools introduced	Additional management tools introduced

## Financial Management

Travel services	\$20 mil	Midwest	On-site cash flow management	Ongoing strategic financial planning
Government contractor	\$8 mil	Midwest	On-site cash flow management	Strategic financial planning
Specialty contractor	\$6 mil	Midwest	On-site cash flow management	Continuing contact with CEO

## Financial Due Diligence

Business services	Not applic	Midwest	Financial analysis of acquisition candidate	Fielded financial management questions
Office equipment	Not applic	Midwest	Financial analysis of acquisition candidate	One-and-done solution

## Financial Product Design

Software developer	Start-up	Midwest	Chart of accounts & KPI's by SIC code	One-and-done solution
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