# CLECONSULTINGFIRM

ACCOUNTING & PROFESSIONAL SERVICES

## Who We Are

**Vision Statement**
To be a trusted accounting and professional services partner of choice by building relationships, promoting financial literacy, and improving the economic landscape of our communities.

**Mission Statement**
To help our clients clarify and achieve their goals, position them for sustainability and success, and provide creative, personalized, solution-driven financial services.

## Who We Serve

- SMALL to MID-SIZED BUSINESSES
- NOT-FOR-PROFITS
- RELIGIOUS ORGANIZATIONS

## Our Services

- Accounting Services
- Payroll Services
- Tax Planning and Preparation
- Audit & Assurance
- Personal Financial Planning
- Business Planning & Formation
- Marketing Services & Strategy
- Stragetic Planning

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CLECONSULTINGFIRM.COM

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Operating a successful business takes an enormous amount of time and energy. As a small business owner, leader of a religious organization, or head of a not-for-profit, you can spend almost half of your time dealing with administrative and non-revenue-generating tasks.[1] But you don't have to. CLE Consulting Firm can provide accounting, bookkeeping, outsourced controllership, tax services and more to meet the fiscal needs of your organization. Our goal and commitment is to complement your existing resources and provide the support necessary to help you grow your business, make informed financial decisions, and feel confident in the accuracy of your financial information.

CLE's team has broad business knowledge and financial expertise that make us a valuable, trusted adviser. CLE is one asset you can't afford to do without as you plan, run, and grow your enterprise. We can provide all of your fiscal needs at a fraction of the cost of hiring someone in-house. Our team of experts and effective leadership can make the difference in you achieving your long-term growth goals.

## Our Services

### ☑ OUTSOURCED SERVICES, INCLUDING CFO/CONTROLLER FUNCTIONS

Ready, set, grow! CLE's CFO/Controllership team offers:

- Cash flow forecasting
- Budget-to-actual reporting
- Variable vs. fixed expense reporting
- Debt planning and reduction
- Labor cost management
- Break-even analysis

### ☑ FINANCIAL REPORTING

CLE provides daily, weekly and monthly financial updates to keep you in the loop with

- Trial balance reconciliation
- Balance sheets
- Monthly reviews of company performance
- Custom financial reports
- Income statements

### ☑ TAX PLANNING & PREPARATION

CLE specializes in tax preparation for individuals and small businesses. CLE can educate you about year-round tax planning, tax-season preparation and filing, liability, and record-keeping. Our goal is to minimize your tax liability while also maximizing your after-tax wealth. CLE's tax team will build the best possible tax strategy for you and your company and prepare and file your taxes timely. CLE's tax team can help not-for-profit organizations determine which type of form 990 is required and assist in the preparation of the form.

### ☑ BOOKKEEPING

CLE's bookkeeping services will help you improve and maintain your records and procedures, and ensure your records are accurate and complete. This detailed reporting will help you make smart decisions to guide your organization as you grow. A bookkeeping solution includes, but is not limited to:

- Business bank reconciliations
- Credit card management
- Sales tax
- Accounts receivable
- Accounts payable
- Payroll

### ☑ COMPILATION, REVIEW & AUDIT

Audits are an important business operation and can be a daunting task; however, an audit is not always necessary. CLE can help you determine whether a compilation, review or audit is required for your venture and provide the appropriate service.

### ☑ BUSINESS STRUCTURE & FORMATION PLANNING

Opening your own business is exciting and thrilling. CLE can develop the systematic action plan of action necessary to realize your dream of owning and running a successful enterprise. We can help you avoid the common pitfalls that many new small business owners make when launching their new product or service.

### ☑ STRATEGIC BUSINESS PLANNING

CLE can assist you with developing a strategic business plan—a blueprint—that describes your company and its products or services, management team, and business risks. We all assess your financial health and help you evaluate the competition. Your strategic business plan will help you clarify your company's direction, ensure your key leaders are aligned with organizational goals and keep both management and staff focused on the tasks needed to grow your business.

**Creating Leading Enterprises**

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