FRACTIONAL CFO / 01

# DEFINE THE BUSINESS CONTEXT AND DECISIONS

Describe the business and decisions at a non-sensitive level. Do not use this page to make financial or management decisions.

A helpful preparation resource from PickYourPro.ai. Fill in digitally or print. Keep your completed copy private.

**Business type, operating model, stage, locations, entities, ownership or governance context, and planning horizon**

**Decisions, questions, challenges, or milestones driving the need for fractional-CFO support now**

**Decision-makers, board, investors, lenders, managers, accounting or tax professionals, and other audiences**

**Current finance team, bookkeeping or accounting support, systems, close process, and reporting cadence**

**Reports, dashboards, plans, forecasts, models, records, or other information currently available**

**Desired practical outcomes, priorities, timing, constraints, unknowns, and decisions reserved to management**



Preparation only. Not accounting, tax, legal, investment, lending, employment, cybersecurity, valuation, forecasting, budgeting, fundraising, controls, or management advice.

FRACTIONAL CFO / 02

# ORGANIZE INFORMATION, ACCESS, AND BOUNDARIES

Inventory what exists and plan a secure review. Keep confidential records and credentials off this public worksheet.

**Data or report sources, owners, systems, periods covered, timing, known gaps, and validation questions**

**Sensitive financial, tax, payroll, employee, customer, banking, investor, lender, or deal records for private review only**

**Secure exchange, account access, permissions, approval, confidentiality, retention, return, and offboarding questions**

**Bookkeeper, accountant, tax adviser, attorney, lender, investor, board, payroll, systems, or other coordination needs**

**Accounting, tax, legal, investment, lending, employment, security, valuation, fundraising, or management boundaries**

**Stakeholder availability, meeting windows, reporting deadlines, implementation capacity, and change constraints**



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FRACTIONAL CFO / 03

# MAP DELIVERABLES, CADENCE, AND OWNERSHIP

Tick items to discuss. Qualified professionals and management must confirm data, assumptions, roles, and decisions.

- [ ] Business context, stakeholders, decisions, and timing are described
- [ ] Available reports, systems, owners, and known data limits are listed
- [ ] Sensitive information stays out of a public request
- [ ] Secure access and information-handling questions will be answered
- [ ] Deliverables, audiences, cadence, assumptions, and sources will be written
- [ ] Accounting, tax, legal, systems, controls, and other boundaries will be clear
- [ ] Implementation ownership, approvals, dependencies, and changes will be defined
- [ ] Management decisions, records, handoff, exclusions, and written terms will be preserved

**Reports, analysis, dashboards, meetings, scenario work, documentation, and decision-support deliverables proposed**

**Cadence, milestones, inputs, assumptions, sources, review, revisions, implementation, and handoff proposed**

**Business, provider, accounting, tax, legal, systems, data-owner, board, lender, and management responsibilities**



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FRACTIONAL CFO / 04

# QUESTIONS FOR THE FRACTIONAL CFO

Record the answer and the scope, deliverable, cadence, responsibility map, or written term that supports it.

**Context: how will you learn the business, decisions, stakeholders, team, systems, reports, deadlines, and limitations?**

**Deliverables: what reports, analysis, meetings, scenario work, documentation, and implementation support are included?**

**Inputs: how will data be validated, assumptions stated, sources recorded, limitations explained, and revisions handled?**

**Security: how will confidential information, permissions, access, retention, return, and offboarding be managed?**

**Roles: who performs the work, coordinates specialists, owns approvals and execution, and makes management decisions?**

**Terms: how do cadence, availability, milestones, price structure, added work, changes, handoff, and ending work?**



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FRACTIONAL CFO / 05

# COMPARE THE SAME FRACTIONAL-CFO SCOPE

Use A and B in every box. Clarify different decisions, inputs, assumptions, deliverables, or ownership first.

**Provider A / B / conversation dates / business context, decisions, stakeholders, team, systems, and reports reviewed**

**Deliverables, audiences, cadence, inputs, assumptions, sources, analysis, meetings, revisions, and exclusions - A / B**

**Security, access, professional coordination, implementation, approvals, management ownership, and handoff - A / B**

**Team, experience presented, availability, timing, complete price structure, changes, written terms, and fit - A / B**

## READY TO HEAR FROM PROS?

Create an account on PickYourPro.ai and start a Fractional CFO request if you choose; this step is optional. Share non-sensitive business context, decisions, stakeholders, deliverables, cadence, and engagement boundaries so participating pros can compete with proposals. Compare scope, responsibilities, timing, complete price structure, changes, written terms, and fit.

**One request. Every pro's best offer.**

Start a request

Participation varies. A secure financial-information and stakeholder review may be needed before a final engagement proposal.

Planning guide: https://www.pickyourpro.ai/services/fractional-cfo

SBA: Manage Your Business (official reference)

IRS: Recordkeeping (official reference)



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