

INTEGRATED FP&A. GREATER FINANCIAL VISIBILITY.



THE QUESTIONS WE HELP ANSWER

Growing businesses face important financial decisions every day:

- ✓ How much cash will we need?
- ✓ How many hires do I need to support goals?
- ✓ Should we expand?
- ✓ What happens if revenue slows?
- ✓ What will my net income be like in the future?

Accurate financial reporting provides the foundation for sound decision-making. Financial Planning & Analysis (FP&A) builds on that foundation by turning financial data into forecasts, models, and actionable insights that help management teams plan for what's next.

WHY COMPANIES CHOOSE WG

One Team:

Accounting, reporting, and planning are delivered by a single coordinated team.

One Set of Numbers:

Forecasts and models are built from accurate, up-to-date financial information.

Scalable Support:

Access FP&A capabilities without adding internal headcount.

Industry-Focused Reporting:

Metrics and analysis are aligned with the drivers that matter most to your business.

Practical Financial Models:

Transparent, Excel-based models that management teams can understand and use.

Forward-Looking Insight:

Scenario planning helps management evaluate options and prepare for what's ahead.

SERVICES

OUTSOURCED CFO, CONTROLLER & ACCOUNTING SERVICES



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FROM DATA TO DECISIONS



WHAT WE DELIVER

Cash Flow Forecasting:

- Budgeting & annual operating plans
- Forecasting
- Financial modeling
- Budget vs. actual reporting
- KPI & performance reporting

Additional Capabilities:

- Headcount planning
- Scenario and sensitivity analysis
- Capital planning
- Investor and lender reporting
- Board presentations
- Three-statement financial models

Where FP&A Creates Value:

- Cash flow visibility
- Hiring decisions
- Growth planning
- Financing readiness
- Board reporting
- Budget development
- Pricing and profitability analysis

COMPLIMENTARY DIAGNOSTIC AVAILABLE

We'll evaluate your current financial planning and reporting processes and identify opportunities to improve forecasting, reporting, and decision support.

LET'S TALK

WilkinGuttenplan partners with founders, owners, and management teams to deliver FP&A that strengthens decision-making, improves visibility, and supports long-term growth.

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