

Use reports in ProfitCents to develop a tiered advisory approach. Each report has different components that can help frame conversations, and can be used to create a financial plan. This guide can help you decide which reports to use as you develop your advisory relationship with clients.

Discover: Industry Data and Industry Data with Company Comparisons Analysis



Report Components

- Real-time industry data
- Multi-year industry trends
- Industry financial ratios
- Industry intelligence (KPIs)
- Industry common-size statements
- Industry-specific recommendations for improvement

Client Service Applications

- Industry research/client meeting preparation
- Proposals/RFPs
- Prospect meetings
- Marketing collateral
- Industry newsletters
- Seminars and presentations

Illuminate: Narrative Analysis



Report Components

- Narrative analysis
- Ratio analysis
- Trend analysis
- Common-size analysis
- Industry intelligence (KPIs)
- Industry comparisons
- Client-to-client comparisons

Client Service Applications

- Exit conferences
- Closing meetings
- Year-end review
- Interim client meetings
- Management presentations
- Delivery of financial statements
- Creating cross-selling opportunities
- Positioning of additional services

Navigate: Projections Analysis



Report Components

- Monthly, quarterly, and annual financial forecasts
- Cash-flow statement forecasts and projections
- "What-if" scenario analysis
- Loan analysis tool
- Discounted Cash Flow valuation tool
- Industry comparisons
- Ratio analysis
- Trend analysis

Client Service Applications

- "Next step" consulting services
- Projections
- Forecasts
- Strategic planning
- Profitability modeling
- Start-up plans
- Budgeting
- Cash-flow management
- Contingency planning
- Cost control modeling
- Exit strategy/succession planning
- Financing Proposal
- Loan analysis

About ProfitCents:

ProfitCents is a financial information company that provides accounting, risk management, financial analysis and business valuation technology solutions to financial services firms and financial institutions. Our mission is to make complicated financial information easier to understand and analyze. Thousands of accounting firms, banks, credit unions, valuation firms and private companies use our applications and information to analyze private-company performance, determine the value of businesses, understand industry trends and assess the credit risk of borrowers. ProfitCents provides the largest real-time database of private-company financial statement information in the United States.

For more information, please email or call: profitcents.support@abrigo.com or 833-4-ABRIGO