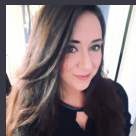




Lorem ipsum



**Kristina Vidal**  
-Senior Customer  
Success Manager

“  
Year-end reviews are a great way to touch base with your clients. Use the Narrative report to provide a financial health-check of their business, and the Projection report to set goals and plan for their success next year.  
”

## Your Guide to Year-End Advisory Engagements



their performance in 2022 and how that compared to last year. Show them how they compare to their industry peers by benchmarking their performance. This also offers an opportunity to set goals for next year, provide budgeting and forecasting models, and even set progress checkpoints throughout the year. This will ensure your clients know you are invested in their success. Check below to see how our ProfitCents reports can help.

As 2022 quickly approaches its close, now is the perfect time to begin planning your year-end advisory engagements with your clients. Take a proactive approach to schedule meetings to review

## Narrative

This report features an easy-to-understand business analysis complete with narrative, graphs, ratios and industry comparisons.

- ✓ Quickly convert financial data into plain language
- ✓ Compare clients to their historical performance and to your other clients within the same industry
- ✓ Highlight six key areas of strengths and weaknesses on a scorecard
- ✓ Compare your clients' performance against industry benchmarks

## Projection

Help clients make changes in their business strategy that can positively impact their financial condition with this report.

- ✓ Forecast client financials to help plan for 2023
- ✓ Evaluate financing and the future impact of planned business decisions like equipment purchases
- ✓ Project cash flow and analyze existing and potential debt
- ✓ Model cost control and budgets to help your client stay on track