

# FINDEX

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## vCFO Services Overview

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Michelle Sinclair – Head of vCFO Services

*YOUR STORY  
IS OUR BUSINESS*

# Who are we?

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## Findex vCFO Services

We serve as trusted vCFO advisors to SME business's, working collaboratively with business owners to achieve sustainable, profitable growth through our vCFO service offering; helping them move beyond where they are to where they want to be

# Elevate Your Business with Findex vCFO Services

At Findex, we take pride in being SME business experts, offering a wealth of experience and a proven track record in assisting small and medium-sized enterprises (SMEs). Here's why outsourcing your vCFO services to us can be a game-changer for your business:

## ***Tailored Expertise for SMEs***

Our dedicated team at Findex understands the unique needs and dynamic environments that SMEs operate in. We specialize in providing solutions crafted specifically for small and medium-sized businesses, ensuring that our vCFO services are perfectly aligned with the challenges and opportunities unique to your sector.

## ***Access a Team of vCFO Specialists***

Unleash the power of a team of vCFO specialists at your fingertips! By outsourcing your CFO needs to Findex, you gain access to a collective expertise seldom found in a single individual.

## ***CFO Leadership without the Overhead***

Picture having CFO-level guidance and leadership without the hefty CFO salary. With Findex vCFO services, you can enjoy the benefits of strategic financial management and valuable insights tailored to your business, all while avoiding the high-priced overhead associated with an in-house CFO. It's a cost-effective solution that doesn't compromise on quality.

## ***Strategic Collaboration for Success***

At Findex, we go beyond providing tailored financial solutions; we cultivate a strategic partnership with our clients. Our vCFO services extend beyond conventional financial expertise, offering a collaborative approach to help you shape your business's future. We work closely with you to understand your goals, challenges, and aspirations ensuring our vCFO services not only address immediate financial needs but also contribute to the overall strategic vision and long-term success of your SME.

# The vCFO Services toolbox

Transforming businesses through strategic financial management



## Strategic Planning

Planning for success. Defining our ambition and creating a plan for achieving long-term business goals.

*Outcome:* We have a clear plan on how we are going to capture opportunities, achieve our ambition and build a sustainable business.



## Financial Planning

Create a plan to achieve short- and long-term financial goals.

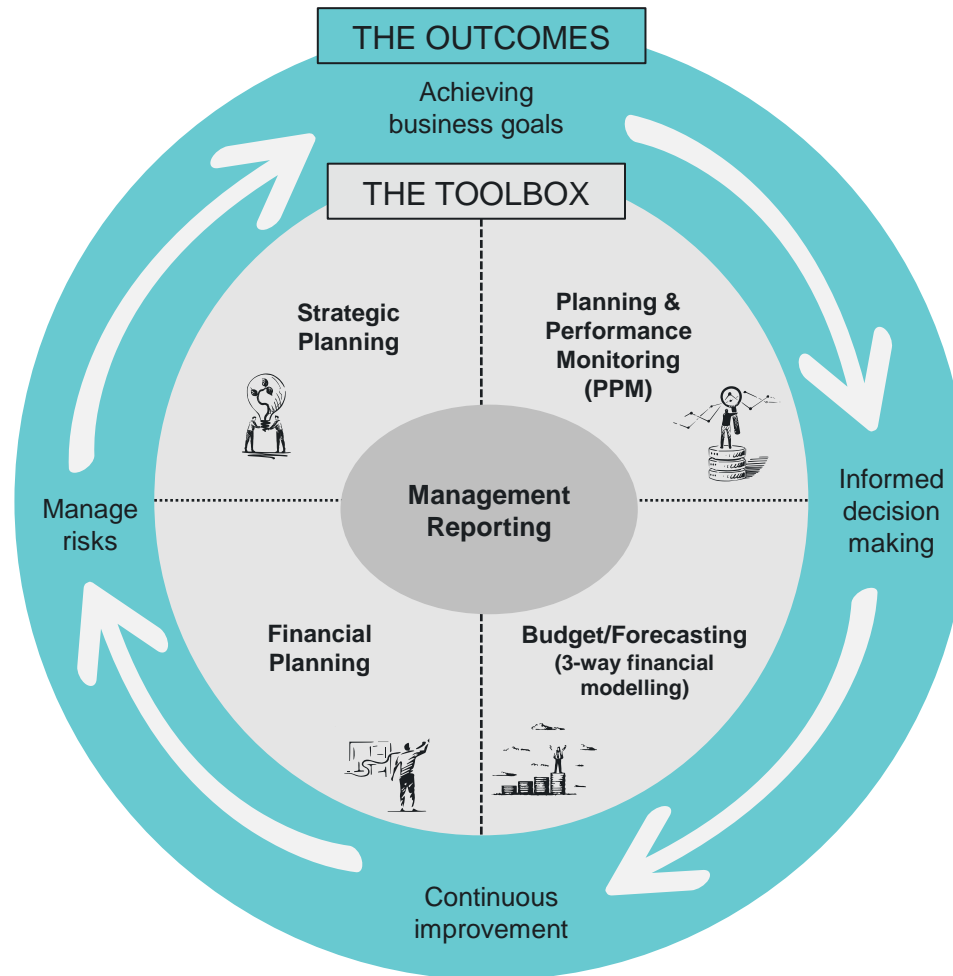
*Outcome:* Understand how to manage our financial resources to achieve our short and long-term financial goals.



## Budgeting/Forecasting

An integral component of financial planning. Using 3-way financial modelling to manage and allocate finances to achieve short-term financial goals.

*Outcome:* Understand our short-term financial goals and how resources need to be allocated over the next 12 months.



## Management Reporting

Customised management reports, serving as the core that allows you to “have your finger on the pulse” enabling informed, data driven decision making.

*Outcome:* Understand how our business is performing financially, tracking progress against our goals and gathering key insights.



## Planning & Performance Monitoring (PPM)

Planning for success through regular PPM meetings.

*Outcome:* Review our results and understand our priorities, focus areas and key action points for the next review period.

# Introducing our Head of vCFO Services



## Michelle Sinclair

Head of vCFO Services  
Accounting & Tax

 Michelle.sinclair@findex.com.au

 (+61) 7 3233 3555

I'm all about fueling the fire of business success and lending a hand to fellow entrepreneurs on their journey. Why? Because I've walked the walk having built and grown our own businesses across New Zealand and Australia, which has been one heck of a ride.

With a rich background as a CFO in these ventures, I've experienced the euphoria of hitting milestones and grappled with the challenges that come with being a business owner. It's these experiences, the ups, and the downs, that make me more than just a business enthusiast – they make me someone who truly understands what you're going through.

Having navigated the complexities of business ownership, I bring a unique perspective to the table. I am committed to leveraging my expertise as a CFO to help others navigate their own journeys successfully. So, if you're a business owner dreaming big and looking for a virtual CFO and trusted advisor to journey with you, let's connect. Together, let's turn your vision into something incredible.

As an accomplished finance professional, Michelle works closely with business owners, Board and C-Suite leaders to drive business performance and achieve goals through vCFO advisory and strategic financial management.

### Experience

Michelle is a seasoned financial leader with a robust background in driving strategic initiatives and fostering business growth. With over 16 years' commercial experience in establishing and building high-growth businesses in both New Zealand and Australia, Michelle brings a dynamic mix of entrepreneurial spirit, strategic advisory skills and financial management acumen to the forefront. Michelle's expertise extends to designing scalable business strategies, building and leading high-performing finance teams, and delivering impactful financial management solutions that enhance organisational performance.

### Qualifications

- Currently studying towards Diploma in Law
- Master of Taxation Studies with First Class Honours
- Bachelor of Management Studies (Accounting & Finance)
- Chartered Accountant (CAANZ)
- Certificate in Human-Centered Strategy & Business Innovation (IDEO U)
- ICAgile Certified Professional in Business Agility Foundations (ICP-BAF)

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## Thank you

[findex.co.nz](https://findex.co.nz)

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