



Advisory Package Examples



Advisory Starter

Description

- Dashboard (one page report, 6 tiles/charts)
- Include Revenue, Gross Profit, Overheads, Balance Sheet, Cash, Commentary
- Clients which are new to advisory (could be turnover, head count or structure defined)
- Price sensitive
- Half hour bi-monthly meeting (perhaps only virtually)
- E.g. A sole trader

Pricing

- From \$150 - 200 per output, or
- \$500 per meeting

Advisory Plus

Description

- Introductory level management report
- 4-5 pages (Incl. exec. summary or action plan, P&L, balance sheet, cash)
- Receptive to advice
- Monthly/quarterly in-person meeting
- E.g. Small to medium size business (could be turnover, head count or structure defined)

Pricing

- From \$300 - 500 per month
- Up to \$5,000 per month for full VCFO service

Advisory Premium

Description

- In-depth, bespoke board level report
- 7-8 pages (incl. KPIs, non-financial analysis, budget)
- Meeting monthly with key stakeholders
- Strategic planning session & annual Cashflow Forecast
- Trading Businesses, Start-ups, Group level consolidated reporting

Pricing

- Reporting from \$500 - 5,000 per month
- Forecasting from \$2,000 - 10,000 per annum.