



SEVEN FIGURE PROFITS™
CFO ADVISORY SERVICES PROPOSAL & AGREEMENT
Effective Date: February 1, 2026

Client Name: Meghann Conter

Prepared By: Seven Figure Profits™ (“SFP”)

1. Purpose of This Agreement

This agreement outlines the scope of advisory services provided by SFP to support Meghann Conter with high-level financial decision-making, strategic cash flow analysis, budgeting, forecasting, and proactive tax planning throughout the year.

2. Scope of Services

2.1 Quarterly Advisory Meetings

You will receive two (2) strategic meetings per quarter:

- One (1) with our CFO — focused on cash flow planning, timing, allocation, budgeting, forecasting, and review of key financial performance trends
- One (1) with Randy Hughes, CPA — focused on tax strategy, business structure, and forward-looking planning

These sessions support:

- Informed financial decision-making
- Risk management from a tax and cash perspective
- Confident navigation of high-stakes decisions

2.2 Budgeting, Variance Review, and Forecasting (Included in quarterly meeting discussions noted in 2.1)

- Budget creation and/or refinement
- Budget variance report review



- Forecasting – prepared by SFP using data from your internal bookkeeping team and reviewed during quarterly CFO advisory meetings.

These items are addressed within the quarterly CFO advisory meetings and informed by the financial reports provided by your internal bookkeeping team.

2.3 Optional Quarterly Cross-Team Meeting

You may request one (1) additional meeting per quarter with another key member of your C-Suite team (e.g., financial advisor, attorney, or business coach).

The purpose of this session is to:

- Close communication gaps across your team
- Align decisions with tax and financial consequences
- Help you feel fully supported and secure in your choices

2.4 Email-Based Support Between Meetings

You're welcome to submit questions by email at any time:

- If time-sensitive: We'll respond directly via email.
- If not time-sensitive: We may recommend holding it for your next meeting to ensure full context and value.

[We ask that you respond to information requests from our team within two \(2\) business days to maintain the integrity of our planning and support.](#)

Note: This engagement does not include action-oriented working sessions or implementation meetings between advisory calls.

2.5 Tax Preparation (Included)

Your engagement includes the preparation of:

- One (1) business income tax return for your primary entity (valued at \$2,500)
- One (1) personal income tax return (valued at \$1,200)

These are included at no additional cost as part of your 12-month agreement.

2.6 Dwight: AI Cash Flow Finder

You'll receive access to Dwight, our internal AI tool designed to:



- Identify cash flow patterns and timing risks
- Suggest optimizations between meetings
- Help you stay in front of financial decision points

2.7 Phoebe: AI Enrolled Agent–Level Strategic Support

You'll also receive support from Phoebe, our in-house Enrolled Agent. She:

- Provides tax and financial guidance that reflects Randy's standards and strategic logic
- Supports between-meeting decision-making
- Bridges the gap when Randy is unavailable for quick responses

3. Financial Review & Bookkeeping

Your bookkeeping is handled by your in-house bookkeeper. SFP will:

- Review and analyze financials provided by your internal team
- Use those reports to inform quarterly cash flow, budgeting/forecasting, and tax strategy meetings
- Highlight any areas that may require correction, clarification, or further review

Note: Regular bank and credit card reconciliations are required for our team to complete their work each month/quarter.

4. Meeting Terms

- Includes two (2) strategic advisory meetings per quarter
- One (1) optional quarterly team-alignment meeting with an external advisor
- Meetings are optional but do not roll over, accumulate, or convert into other services

5. Payment Terms

- Monthly Fee: \$1,400
- Term: 12 months (February 1, 2026 – January 31, 2027)
- Billing: Automatically debited on or around the 1st of each month

This monthly rate includes all services listed above. It is not adjusted based on meeting usage.

6. Early Termination Policy

If this agreement is terminated early and tax preparation services have already been completed or substantially performed:



- \$1,200 will be billed for the personal return
- \$2,500 will be billed for the business return

These fees reflect the value of the work completed and are non-refundable.

7. Client Responsibilities

To ensure optimal service, the Client agrees to:

- Provide accurate and complete financial data in a timely manner
- Respond to SFP communications within 2 business days
- Inform SFP of material changes in business structure, major expenses, or financial shifts
- Ensure bookkeeping is up-to-date and accessible for review

Delays in data delivery or communication may impact the timing or quality of services.

8. Confidentiality & Communication

- Strategic guidance is delivered primarily in meetings for documentation and context.
- All client data and communication are handled with strict confidentiality and professional discretion.
- Non-urgent matters may be held for your next meeting.

9. Term & Termination

- The agreement begins on February 1, 2026, and continues for 12 months.
- After the 12-month term, either party may cancel with 30 days' written notice.
- Early termination does not waive the full financial commitment for the 12-month term.

10. Support & Resolution

SFP is committed to your support and a professional service experience. If you have any concerns about service quality, communication, or outcomes, please contact francisco@cpennies.com to address the issue swiftly and respectfully.

11. Use of Technology

SFP integrates tools like Dwight and Phoebe to provide enhanced support. All AI-driven tools are reviewed and guided by licensed, credentialed professionals to support accuracy and integrity.

12. Agreement & Signatures



By accepting, both parties confirm their understanding and acceptance of

Meghann Conter

Meghann Conter 02/05/2026

Randy Hughes

Randy Hughes 02/05/2026