

SEVEN FIGURE PROFITS

Managing Partner Advisory Retainer - Experienced Guidance for CPA Firm Owners

Running a modern successful CPA firm requires a variety of expertise. Every week brings decisions about clients, staff, pricing, growth, tax strategy, and firm operations that can significantly impact your business.

The SFP Managing Partner Advisory Retainer gives you direct access to experienced advisors who have built and operated successful accounting firms, allowing you to make important decisions with greater confidence without adding an expensive managing partner to your firm.

Most firms recover the cost of this retainer by avoiding just one pricing mistake, one difficult client decision, one problematic hire, or one missed advisory opportunity each year. Our goal is to help you make better decisions before they become expensive lessons.

Investment

\$1,500 per month

What's Included

Practical guidance on the issues that matter most to your firm, including:

- Complex tax strategy and second opinions
- Tax resolution and IRS representation questions
- Pricing and packaging of services
- Difficult client situations
- Hiring, staffing, and team management
- Practice growth and advisory services
- Business development and sales conversations
- Firm operations and leadership decisions
- Finance Office & CFO advisory opportunities

When You Are Ready, Let's Talk
Renee@sfpprofits.com

How We Do It

- Up to two 30-minute **advisory sessions** each month to discuss your highest-priority issues.
- On-Demand Advisory Access via **email/Loom**
- **6 Advisory Desks** - Every question is supported by experienced professionals across our firm's areas of expertise:
 - Tax Planning Strategy
 - Tax Resolution
 - Practice Leadership
 - Business Development
 - CFO Advisory
 - Complex Case Review

Instead of searching for answers alone, you'll have experienced professionals available to help you evaluate options before making important decisions.

This partnership is designed for independent CPA firms and boutique accounting practices that want experienced guidance while maintaining their independence. This partnership supports strengthening their strategy, operational, and leadership capabilities.

Our Team of Advisors



Renée Hughes
*Co-Owner
Executive Performance
Advisor*



H. Randy Hughes III
*Co-Owner/CPA
Tax Strategist*



Bryan Syrene
*CPA,
Tax Strategist*



Abid Hussain
*Fractional CFO &
Strategic Advisor*



Rudy Cortes
*Tax Resolution
Specialist*



Emina Saracevic
*Senior Tax & Accounting
Strategist*



Katrina Kopeck
Fractional COO



Carl Proszek
Financial Accountant

For less than the cost of an entry-level contractor, you'll have access to an entire firm acting as your managing advisory partner.