



# **DAN ROMEO**

## **FINANCIAL CONSULTING SERVICES**

**FINANCIAL SOLUTIONS FOR YOUR ROAD AHEAD**

# OUR EXPERIENCE

Dan Romeo is an accomplished finance executive and entrepreneur with over 20 years of experience in corporate finance, financial strategy, and business leadership. As the founder of his own financial consulting company, Dan specializes in providing fractional CFO/COO services to all size companies within various industries, helping them optimize financial performance, improve profitability, and achieve long-term growth.

Dan's expertise spans a wide range of financial services, including financial planning and analysis, budgeting, forecasting, cash flow management, and profitability analysis. He has successfully guided numerous businesses through high-growth phases, mergers and acquisitions, and complex financial challenges. Known for his strategic creative approach, Dan crafts tailored financial road maps that align with each client's unique goals, offering a level of personalized service that sets him apart from larger consulting firms.

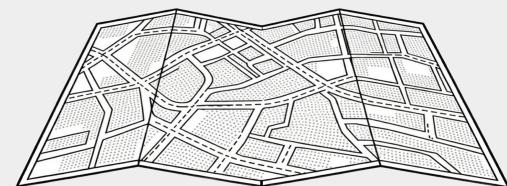
# OUR FOUR E's PHILOSOPHY

**Entrepreneurial:** Out-of-the-box thinking, driven by doing more with less. No task is too challenging, and pivoting as needed.

**Experienced:** +15 years of working, leading, growing various organizations through data and passion.

**Expertise:** Able to sift through the noise while listening before speaking to understand the task and goals at hand.

**Engagement:** Understanding your audience and captivating them through creativity to communicate even the most difficult topics for buy-in.



# WHY YOU SUCCEED

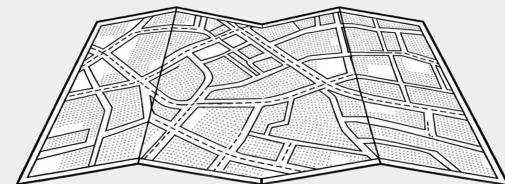
We enable clients to make informed, data-driven decisions that drive growth, improve profitability, and enhance operational efficiency.

We listen. Our clients goals are our goals.

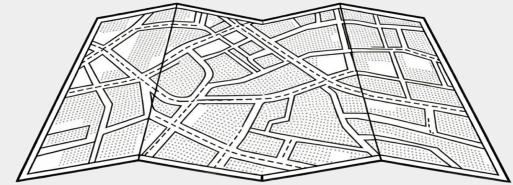
We tailor financial solutions to empower our clients to navigate challenges, optimize cash flow, and strategically plan for the future.

We ensure our clients have the financial clarity and tools they need to achieve their business objectives for long-term success.

**We help clients create their financial road map.**



# YOUR ROADMAP



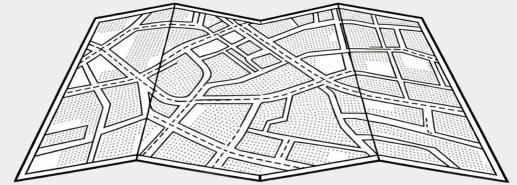
## Checkpoint 1: Identify & Understand

- Listening: What are your goals and objectives.
- P&L and BS review.
- Identifying current reporting and cadence for gaps.
- Establish YoY metrics for trends and current performance.

## Checkpoint 2: Build

- Forecast Building:
  - Based vs Incremental revenues, BD and Pipeline risk assessment.
  - 90 day rolling, reforecasting periods, and trending comparatives.
- Budget Building:
  - Determine granularity and needs.
  - Quarterly and Yearly budgeting process.
  - MoM, QoQ, and YoY comparatives

# YOUR ROADMAP



## Checkpoint 3: Performance Review

- Identify key products / services for profitability analysis.
- Establish trends and areas for improvement.
- Operational Cost and Staffing metrics.

## Checkpoint 4: The fun begins!

- Establish Key Performance Indicators (KPIs).
- Build a Management Dashboard for visibility off KPIs.
- Create a reporting cycle and provide to Leadership.
- Create Leadership Meetings and plan of action / key takeaways.
- After Action Reporting.

# **YOUR FINANCIAL ROAD MAP AWAITS**

**Dan Romeo, former Owner/Founder/CFO**

**Financial Consulting  
San Diego, CA**

**Email: Dan.Romeo81@gmail.com**

**Direct: (551) 427-1916**

**LinkedIn: [www.linkedin.com/in/danjromeo](https://www.linkedin.com/in/danjromeo)**

