



*YOUR GUIDE TO OUR  
Accounting Support  
Services  
for Professional Service Firms*



SYNERGY PATHFINDERS, LLC®



# *Empowering your firm with financial precision and confidence*

Running a successful professional services firm requires more than just delivering great client work. Behind the scenes, accurate financial management is essential to ensuring profitability, maintaining compliance, and scaling operations. From law practices to marketing agencies, each relies on financial clarity to drive performance.

Our accounting support services are designed specifically for firms like yours. Whether you're navigating project-based billing, managing partner compensation, or forecasting cash flow during periods of growth, we provide the tools, insights, and support to keep your financial house in order- without the overhead of a full-time CFO.

This guide outlines the services we offer and how they help professional service firms like yours:

- Improve cash flow visibility
- Reduce financial risk
- Accelerate month-end closes
- Make informed, data-driven decisions

Let us help you gain control over your financial operations so you can stay focused on what matters most your clients and your firm's growth.

# *Why Firms Turn to Us*

Make every move count. With trusted financial support, gain the clarity and confidence to grow your firm—without slowing down.

Staffing and retaining qualified accounting professionals is becoming more difficult—and extensive. Even if you have an internal team, they can be stretched thin by seasonal demands, special projects, or unexpected needs.

Rather than hiring additional full-time staff, you can scale up with our flexible, skilled financial support when and where it's needed. From trust account reconciliations to budgeting for a new office expansion, we deliver experienced insight without adding a CPA to your payroll.



# Cash Flow Forecasting

Why It Matters: Avoid cash crunches, plan for large expenses, and stay in control of your financial future.

Professional service firms often operate with delayed billing cycles, retainers, and fluctuating revenue. We help you anticipate and manage cash flow to avoid surprises and plan for the future with confidence. Our cash flow forecasting services include building customized models that align with your unique billing practices, project timelines, and client payment behaviors. With clear, actionable insights, you can make informed decisions about investments, staffing, and growth with greater financial control.

## **Services include:**

- Review of historical cash flow trends
- Forecasted vs. actual cash flow analysis
- A/R and A/P tracking
- Ongoing support

## **Deliverables can include:**

- Initial cash flow assessment
- Customized forecast models
- Weekly/ monthly cash flow updates
- Visual reporting dashboards
- Actionable recommendations



*“Never take your eyes off the cash flow because it’s the lifeblood of business.”*  
– Sir Richard Branson

# Tax Preparation Assistance

Why It Matters: It saves time and ensures accuracy.

Tax season doesn't have to pull focus away from your client work. We help organize and prepare financial records for year-end reporting, ensuring your firm stays compliant with minimal stress. Our team coordinates closely with your tax preparers to streamline documentation, identify potential deductions, and reduce filing errors. With our support, you can meet deadlines confidently while keeping your attention where it matters most—on serving your clients.

## **Services include:**

- Initial consultation and planning
- Document collection and preparation
- Expense and income categorization
- 1099 contractor reviews
- Post-filing follow-up

## **Deliverables can include:**

- Year-end checklist
- Partner draw and distribution reports
- Financial statements for tax filing



*“Taxation is the price  
we pay for  
civilization.”  
– Oliver Wendell  
Holmes Jr.*

# Budget Preparation and Support

Why It Matters: Know exactly where your money is going, how much you need to grow, and when to pivot.

Effective budgeting supports decisions around staffing, compensation, growth investments, and software planning. We help you design a realistic, informed budget tailored to your firm's priorities. Our approach ensures your budget reflects both operational needs and strategic goals, giving you a clear roadmap for resource allocation throughout the year.

## **Services include:**

- Budget planning meetings
- Ongoing review and updates
- Participation in leadership planning sessions

## **Deliverables can include:**

- Budget vs. actual templates
- Break-even and profitability analysis
- Customized budget development



*“Beware of little expenses. A small leak will sink a great ship.”*

*– Benjamin Franklin*

# *Financial Reviews*

Why It Matters: Make decisions based on reliable numbers, catch mistakes early, and plan with confidence.

Your financials should clearly reflect the health of your firm. We conduct independent reviews to catch misclassifications, detect trends, and ensure data integrity for better strategic decision-making. Our fresh perspective helps uncover inefficiencies and overlooked opportunities that may be hidden in your day-to-day reporting. With accurate, well-structured financials, you can confidently evaluate performance and plan for your firm's future.

## **Services include:**

- Personnel interviews
- Transaction- level review
- Proposals for adjusting entries
- Leadership meetings and feedback
- Ongoing consulting support

## **Deliverables can include:**

- Reviewed financial statements
- Ratio and variance analysis
- Executive summary
- Recommendations for improvement



*“Accounting is the language of business.”*  
– Warren Buffett

# *Policies and Procedures*

Why It Matters: Save time, reduce errors, and ensure your financial processes are efficient, secure, and easy to follow.

Establishing consistent accounting policies is key for scalability and compliance. We help define and document your firm's accounting workflows, approval structures, and internal controls. This creates clarity across your team, reduces the risk of errors, and supports smoother financial reviews. As your firm grows, standardized processes make it easier to onboard new staff and contractors and maintain financial consistency.

## **Services include:**

- Review of current policies
- Recommendations for improvement

## **Deliverables can include:**

- Custom accounting policies manual
- Documentation of key procedures
- Internal controls and duties matrix
- Workflow checklists and templates
- Editable digital format



*“If you don’t have a process, you don’t have a business – you have a mess.”*  
– Michael Gerber



# *Tailored solutions*

## Our Approach.

We integrate quickly into your workflow and become a trusted extension of your internal team:

- Initial consultation
- Define scope
- Onboarding
- Implementation
- Adjust & improve

## ***Why partner with us?***

- Access experienced financial insight without a full-time hire
- Improve accuracy and internal controls
- Reduce compliance risk
- Scale your firm with confidence
- Focus your team on billable work, not back-office environment
- Accelerate month-end close and improve reporting quality

# About Us

Synergy Pathfinders, LLC (SP) was founded to help growing organizations implement smart, scalable accounting and operational procedures.

Our founder, Heather Garland, brings over 25 years of extensive experience, including over a decade in public accounting. Prior to launching SP, Heather served as the inaugural Chief Operating Officer at Alaska's largest locally-owned certified public accounting firm. Her proven track record includes successfully guiding organizations through crucial improvements in both accounting and operational efficiency. "My passion is working with companies to find solutions for their obstacles - including the ones they don't know they have," says Heather.



*Heather*



Ready for a free consultation?  
Scan the QR Code!



**SYNERGY PATHFINDERS, LLC ®**

[www.synergypathfinders.com](http://www.synergypathfinders.com) | (703) 965-1355

[heather@synergypathfinders.com](mailto:heather@synergypathfinders.com)

Follow Us on [LinkedIn](#) and [Facebook](#)!