



EVERY GROWING BUSINESS DESERVES **CFO** LEADERSHIP

We become your dedicated Fractional CFO — bringing continuous financial reviews, compliance oversight, management reporting, decision support, and hands-on guidance while working alongside your team to strengthen financial discipline, improve business systems, and enable sustainable growth.

01

Manufacturing & Trading

02

Family-Owned SMEs

03

Service Businesses

Financial Leadership for **Growing** Businesses

AdviceUp is a strategic financial consulting firm founded by Chartered Accountants **Priyam & Surbhi Laddha**. We partner with ambitious businesses to move from uncertainty to structured momentum.



CFO-level insight

See your business the way a finance chief would.



Disciplined Operations

CFO level insight – Better Financial Decisions



Hands-on execution

We work on-ground with your team, not from a distance.

What most business owners face today

 01 No regular review Books aren't reviewed regularly. Nobody checks if the numbers are right.	 02 No early warning Problems surface only after they've already hit. No one flagged them early.	 03 No visibility The owner doesn't know if the business is growing, flat, or slowly declining.
 04 No plan for growth The business runs on instinct, not numbers. No annual plan, no targets.	 05 Fear of notices Compliance piles up silently — with no one tracking or resolving it on time.	 06 No one to call No guidance for day-to-day challenges or big decisions — the owner does it alone.

Every month, without fail

6 DELIVERABLES

M01  Accounts & Books Review Full Tally review — every entry checked, every issue flagged.	M02  Vouching & Verification Every transaction vouched and verified against supporting documents.	M03  P&L & Balance Sheet A clear picture of revenue, expenses, and profit every month.
M04  Compliance Check Key compliance areas reviewed monthly — so nothing slips through.	M05  MIS Report One simple report — your key numbers in plain language.	M06  Budget vs Actual Compare plan against reality — clear guidance on what to fix.

Always on — across every cadence



WEEKLY

Check-in Call

A short call each week to catch urgent issues early.



MONTHLY

Owner Meeting

A dedicated session to review and plan next steps.



QUARTERLY

Business Review

A deeper 3-month review and forward plan.



ANNUAL

Financial Roadmap

A 12-month plan — revenue, cost and working-capital targets.



ON DEMAND

Reply to GST Notices

We draft and manage replies on your behalf.



ON DEMAND

Business SOPs

Standard Operating Procedures drafted for your processes.



ONGOING

With Your Team

We work directly with your finance and accounts team.



ON DEMAND

Advisory

Available for daily challenges and big decisions alike.

Before & after AdviceUp

BEFORE ADVICEUP	AFTER ADVICEUP
✗ Month ends but the books aren't closed.	✓ Books closed on time — clean and complete.
✗ Numbers handed over — nobody explains them.	✓ Every number explained in plain language.
✗ Compliance issues pile up, untracked.	✓ Compliance tracked — notices replied, gaps closed.
✗ Every financial decision made alone.	✓ A team on every important financial decision.
✗ No SOPs — processes stay informal.	✓ SOPs in place — clear processes run the business.
✗ No plan — just working day to day.	✓ A 12-month roadmap — clear direction for the year.

Simple. Ongoing. Always there.

01



Understand Your Business

A first meeting to learn your business, numbers, goals, and challenges.

02



Set Up the Framework

Review books, set up MIS, define KPIs, and prepare your first health report.

03



Monthly Review & Guidance

Every month — in person or by call — we review, advise, and keep you on track.

04



On-Demand Support

Available for daily challenges and big decisions — not just scheduled meetings.



GET IN TOUCH

Ready for your own Business Review & Monitoring?

Let's talk. The first conversation is free — no commitment required.

SERVICE

Fractional CFO

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