



Pitch Book Q3 2024 - General



Table of Contents

- About Us
- Our Philosophy
- About Me
- Services Lines
- CFO Corner Suite Services
- Business Brokerage Services
- Client Services



About Us

Founded in 2023, Coastal Breeze is a full service accounting and advisory firm that provides accounting, bookkeeping, CFO Advisory & Business Brokerage services to family offices, individuals and businesses of all sizes

"Client Focused" firm with a geographic preference to the Manatee/Sarasota County Area - investing in people and businesses in our local community





Our Philosophy

"A Business Should Be Simple"

A business should sell a good or service that adds value, charges a profitable amount and collects on that revenue

"Business Should Be Fun"

Nobody should be stressed, worried or overwhelmed

"Partnership Priority Over Profit"

Look to grow organically and expand your knowledge and expertise with partners rather than transactional opportunities



About Me

- 15+ Year Experienced Financial Professional
- Various Roles Across the "CFO" Suite and Consulting Firms
 - CFO, Controller, VP of FP&A, Chief of Staff, Financial Analyst
- Multiple Industry Experience
 - Manufacturing, Gaming, SaaS, Healthcare, etc.
- Extensive ERP & Payroll Solutions Program Experience
 - Netsuite, QBO, Sage, ADP & Many More
- Licensed Real Estate Sales Associate
- Bentley University Graduate





Service Lines

Coastal Breeze Advisory Provides Multiple Services to Our Clients but
Focuses on Three Main Verticals



CFO Corner Suite

Accounting/Bookkeeping



Transaction Recording

Reconciliations

Federal Tax Filings

State Tax Filings

Treasury Management

Payroll Services

Accounts Receivable

Accounts Payable

Depreciation &
Amortization



CFO Corner Suite

Advisory Services

**Financial Planning
& Analysis**

Operational Analysis

Stakeholder Reporting

**Three Statement
Modeling**

**Key Performance
Metrics (KPI's)**

Board Decks

13 Week Cash Flows

Margin Analysis

Lender Reporting

Strategic Initiatives

Variance Analysis

Ad-Hoc Reporting



Business Brokerage



Succession Planning

Exit Strategies

Business Valuation

Confidential Marketing

Financing

Investment &
Expansion

Negotiations

Sell Side Readiness

Transition Planning



Client Services



Tech Stack Introduction

Employee Placement

Ad-Hoc Analysis

Project Management

Social Media

Marketing

Re-branding

Healthcare & Benefits

Information Technology



Contact Us



CoastalBreezeAdvisory.com



941-504-5103



General@CoastalBreezeAdvisory.com