

# 360 FINANCIAL DIAGNOSTIC



ACCOUNTING & ADVISORY

[www.peakforward360.com](http://www.peakforward360.com)

*Find out exactly where your financials are breaking down – before it costs you.*

Most business owners don't know what they don't know.

The 360 Financial Diagnostic gives you a clear, controller-level assessment of your financials, reporting, cash flow visibility, and operational readiness--so you can understand where risks exist, what's working, and what needs attention.

## THIS IS FOR YOU IF...

- ✓ You have accounting support in place, but still feel like you're missing the full financial picture
- ✓ Revenue is growing, but profitability and cash flow still feel unclear
- ✓ You're preparing for a loan, investor conversation, or major business decision
- ✓ You know something feels off financially--but can't pinpoint what
- ✓ You've outgrown basic bookkeeping and need a higher-level financial perspective

## WHAT YOU'LL WALK AWAY WITH



**A written 360 Financial Report**  
Yours to keep, share, and act on.



**A stoplight scorecard**  
Across all three key pillars.



**Identified risks and operational gaps**  
Specific, not vague.



**Prioritized action plan**  
Ranked by urgency and impact.



**Greater clarity and confidence**  
To make better decisions and move your business forward.

## WHAT WE EVALUATE

Your finance function is assessed across three key pillars:



### FINANCIAL FOUNDATION

Chart of accounts, data integrity, reconciliations, and overall financial structure



### REPORTING & CLOSE

Reliability, timeliness, and decision-readiness of your income statement, balance sheet, and cash flow statement



### SYSTEMS & OPERATIONS

Accounting systems, integrations, internal controls, SOPs, and scalability readiness

## INVESTMENT



**Most engagements are priced at \$1,000**

**One-time engagement**  
Includes written report + live debrief call



If you move forward with ongoing services within 60 days, your diagnostic investment will be credited toward onboarding.

## Book Your 360 Financial Diagnostic

Peace of mind starts with understanding where your financials stand today

[Schedule Now](#)

### ABOUT PEAK FORWARD 360

Peak Forward 360 provides fractional controller and outsourced accounting services for growing businesses that need stronger financial visibility, structure, and decision support.

We help bridge the gap between bookkeeping and CFO-level advisory by improving financial reporting, cash flow visibility, operational processes, and overall financial clarity.



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