

FINANCE & VALUE CREATION

Finance Transformation Built for Private Equity

Private equity investors expect portfolio companies to deliver timely, reliable financial information, maintain disciplined cash flow management, and provide the operational visibility necessary to execute the investment thesis.

Institutional-grade reporting is not optional under private equity ownership. It is the baseline sponsors expect.

Kaufman Rossin Private Equity helps sponsors and management teams build and operate institutional-grade finance organizations capable of meeting the reporting, governance, and operational demands of private equity ownership.

From interim CFO leadership and accounting operations to ERP transformation and internal controls, our team provides the expertise needed to support value creation initiatives, satisfy lender and investor requirements, and prepare companies for a successful exit.

TYPICAL CLIENTS

- *Businesses preparing for refinancing, recapitalization or exit*
- *Companies modernizing ERP systems*
- *Carve-outs and stand-alone companies*
- *Portfolio companies pursuing add-ons*
- *Companies facing sponsor or lender reporting gaps*
- *Newly acquired portfolio companies*
- *Companies with a CFO or Controller vacancy*
- *Founder-led businesses in transition*

46% Share of PE-backed middle market companies citing reporting complexity as a top-three challenge of PE ownership

Built for every stage, from formation to exit.
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VALUE DELIVERED

- *Enhanced sponsor and lender reporting*
- *Greater visibility into operational performance*
- *Improved cash flow and working capital management*
- *Scalable finance infrastructure*
- *Reduced operational and compliance risk*
- *Accelerated execution of value creation initiatives*
- *Increased readiness for future transactions and exits*

CAPABILITIES ACROSS THE FINANCE FUNCTION

Each partner-led engagement is scoped to the portfolio company's stage, ownership structure and reporting requirements.

Interim Leadership & CFO Services

- *Interim CFO and Controller leadership*
- *Board, sponsor, and lender reporting*
- *Cash flow forecasting and FP&A*
- *Strategic finance support*
- *KPI and performance measurement design*

Technology & ERP Transformation

- *ERP selection and implementation*
- *Finance process automation*
- *Reporting and dashboard development*
- *Systems integration and data governance*

Accounting & Finance Operations

- *Outsourced accounting and controllership*
- *Close process optimization*
- *Management and working capital reporting*
- Accounting policy and process enhancement
- *Finance organization design*

Controls, Governance & Readiness

- *Internal control design and implementation*
- *Audit and exit readiness support*
- *Segregation of duties assessments*
- *Compliance and governance enhancements*

Source: National Center for the Middle Market

WHO WE ARE

Kaufman Rossin is a Top 50 firm and awarded Best of Accounting for Client Satisfaction. Here's some other distinctions for our firm:

65+ years of experience

700+ employees

#1 ranked Best Places to Work

A LEGACY OF INDEPENDENCE

For more than 65 years, Kaufman Rossin has remained independent by choice. As mergers, acquisitions, and outside investment reshape the accounting profession, we have continued to grow organically. That independence allows us to put our clients and our people first.

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