



JORDYN'S FINANCE

FRACTIONAL FINANCE & CFO SUPPORT

Financial clarity *for your business.*

*You already know how to build something your customers love.
I help make sure the business behind it is just as strong.*

KNOW YOUR NUMBERS

Understand what you
earn, spend and keep.

PAY YOURSELF

Create a realistic
owner-pay plan.

GROW WITH A PLAN

Make decisions based on
profit and cash flow.

PREPARED FOR BUSINESS OWNERS, ENTREPRENEURS & GROWING TEAMS

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Your business should make sense on paper.

A busy business does not always equal a profitable one. Between rent, inventory, supplies, software, card processing, payroll, marketing and personal withdrawals, it can be difficult to know how much money the business is actually producing.

Jordyn's Finance turns your financial activity into a clear picture and a plan, so you can make confident decisions about profitability, pricing, spending, paying yourself, taxes and growth.

HOW I CAN HELP

01 Profitability

See what is left after the real cost of running your business.

02 Cash Flow

Understand where your money goes and what needs to stay in the business.

03 Owner Pay

Create a consistent approach to paying yourself instead of guessing.

04 Pricing

Evaluate whether your pricing supports your income and profit goals.

05 Tax Readiness

Set a practical tax reserve target and reduce last-minute surprises.

06 Growth Planning

Plan financially for hiring, a new location, new offerings, equipment or expansion.

“I made money this month... so why doesn't it feel like I did?”

THAT IS EXACTLY THE KIND OF QUESTION WE ANSWER TOGETHER

Your Business Financial Checkup

We start by understanding where your business stands today. The goal is not judgment — it is clarity.

WHAT WE REVIEW

- ◆ Recent business bank and credit-card activity
- ◆ Sales and payment-platform reports
- ◆ Products, services and current pricing
- ◆ Rent or lease and recurring overhead
- ◆ Inventory, supplies and materials spending
- ◆ Card processing and platform fees
- ◆ Business debt and recurring subscriptions
- ◆ How and how often you currently pay yourself
- ◆ Tax savings and business cash reserves
- ◆ Your next 6–12 months of business goals

WHAT YOU WALK AWAY KNOWING

01

Revenue

What the business is bringing in.

02

Expenses

What it costs to operate.

03

Profit

What the business is actually keeping.

04

Owner Pay

What you can reasonably pay yourself.

05

Tax Reserve

What to intentionally set aside.

06

Next Moves

Where to cut, invest or grow next.

Ways We Can Work Together

Start with a financial reset, then continue with monthly support if you want ongoing guidance and accountability.

ONE-TIME ENGAGEMENT

Business *Financial Reset*

- ◆ Financial health assessment
- ◆ Income and expense review
- ◆ Profitability snapshot
- ◆ Product / service pricing review
- ◆ Owner-pay recommendation
- ◆ Tax reserve target
- ◆ Monthly business budget
- ◆ 90-day financial action plan

BEST FOR

Business owners who need to organize their finances, understand where they currently stand, and create a clear financial plan.

ONGOING SUPPORT

Monthly Financial *Partnership*

- ◆ Financial organization & review
- ◆ Budget vs. actual reporting
- ◆ Cash-flow monitoring & planning
- ◆ Expense, margin & pricing analysis
- ◆ Owner-pay planning
- ◆ Tax reserve tracking
- ◆ Monthly financial dashboard
- ◆ Strategy meetings & growth planning

BEST FOR

Business owners who want ongoing financial management, accountability, reporting and strategic guidance.

Choose Your Level of Support

Every engagement is custom quoted on your discovery call.

MONTHLY FINANCIAL PARTNERSHIP

Financial Management

IDEAL ANNUAL REVENUE

Up to \$150K

CUSTOM QUOTE ON CALL

Solo service-based owners such as hairstylists, estheticians, nail technicians, consultants and other independent professionals.

- ◆ Bookkeeping & organization
- ◆ Income & expense tracking
- ◆ Account reconciliation
- ◆ P&L & budget vs. actual
- ◆ Cash-flow monitoring
- ◆ Owner-pay planning
- ◆ Tax reserve tracking
- ◆ Basic monthly dashboard

Financial Strategy

IDEAL ANNUAL REVENUE

\$150K – \$500K

CUSTOM QUOTE ON CALL

Established businesses that need financial management plus deeper analysis and strategy.

- ◆ Everything in Management
- ◆ Expanded budget analysis
- ◆ Pricing & profitability analysis
- ◆ Expense & margin analysis
- ◆ Cash-flow planning
- ◆ Monthly strategy meeting
- ◆ Growth planning
- ◆ Detailed dashboard & reporting

Growth CFO Partnership

IDEAL ANNUAL REVENUE

\$500K+

CUSTOM QUOTE ON CALL

Larger or more complex businesses: teams or contractors, multiple revenue streams, expansion, new locations or financing needs.

- ◆ Everything in Strategy
- ◆ Payroll & team oversight
- ◆ Multi-revenue-stream analysis
- ◆ Expansion & location planning
- ◆ Financing readiness
- ◆ Advanced forecasting
- ◆ Scenario & investment planning
- ◆ Priority access & support

ONE-TIME ENGAGEMENT

Business Financial Reset

INVESTMENT

Custom quote on your discovery call

Please note: Ideal revenue ranges are a general guide. Your quote is provided on your discovery call and depends on business size, transaction volume, number of accounts, payroll and team complexity, bookkeeping condition, and the level of financial support required.

Getting Started

The process is intentionally simple. We organize the numbers first, then use them to build a plan you can actually follow.

01

Discovery

We talk about your business, current challenges and financial goals.

02

Financial Intake

You provide the requested business information through the agreed secure method.

03

Analysis

I review your revenue, expenses, cash flow, pricing and owner pay.

04

Strategy Session

We walk through what the numbers are saying and identify your priorities.

05

Action Plan

You receive clear next steps and, if desired, transition into monthly support.

READY TO GET CLEAR ON YOUR NUMBERS?

*Let's build a financial system that supports the business you are creating,
not just the appointments on this week's calendar.*

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Client Financial Snapshot

Use this page to prepare for your discovery meeting. Estimates are completely fine. Fields can be typed into directly.

BUSINESS / BRAND NAME

PRIMARY PRODUCTS / SERVICES

HOW LONG HAVE YOU BEEN IN BUSINESS?

RENT / LEASE

AVERAGE MONTHLY SALES

AVERAGE MONTHLY BUSINESS EXPENSES

HOW DO YOU CURRENTLY PAY YOURSELF?

BUSINESS & PERSONAL SPENDING SEPARATE?

DO YOU SAVE FOR TAXES? IF YES, HOW MUCH?

DO YOU HAVE BUSINESS DEBT OR PAYMENT PLANS?

ACCOUNTING SOFTWARE OR BOOKKEEPER IN USE?

WHAT IS YOUR BIGGEST FINANCIAL CONCERN RIGHT NOW?

WHAT WOULD YOU LIKE THE BUSINESS TO ACCOMPLISH IN THE NEXT 12 MONTHS?

Please send your completed snapshot to jordynsfinance@gmail.com at least 24 hours before our meeting session.



Jordan Duncan, MSF

FRACTIONAL CFO

MASTER OF SCIENCE IN FINANCE

— ◆ —
Let's get clear on your numbers.

PHONE

630-664-7763

WEBSITE

jordynsfinance.com

EMAIL

jordynsfinance@gmail.com

JORDYN'S FINANCE

FRACTIONAL FINANCE SUPPORT FOR GROWING BUSINESS OWNERS