

CFO & Advisory Services for Business Owners

CFO



DGPerry
CPAs + Advisors

CFO & Advisory SERVICES



DGPerry.com



Services	Controllership	Essentials	Oversight
Year-end Adjustments	✓	✓	✓
Quarterly Adjustments	✓	✓	✓
Software Conversion	✓	✓	✓
Timely Monthly Financial Statement Packages	✓	✓	
Day-to-day Record Keeping	✓	✓	
Financial Planning & Analysis including Budgeting, Forecasting, and Projections	✓	✓	
Sales Tax Returns	✓		
Bill Pay Services	✓		

**PROUDLY
SERVING MORE
THAN 16,000
CLIENT PARTNERS
EACH YEAR**

DGPerry is a growing professional services firm with eight offices located throughout Florida, Ohio, and Pennsylvania. Founded in 2002, Bodine Perry now employs more than 160 professionals with a wide range of experience and skills, providing accounting and advisory solutions to a variety of industries.

Our primary objective is quality service. To help us meet this objective, each of our valued clients works directly with a partner or director of the firm whose focus is to ensure the needs of the client are met, on-time, and with the highest-quality engagement team.

DGPerry is a member of the American Institute of Certified Public Accountants (AICPA), the Florida Institute of CPAs, the Ohio Society of CPAs, the Pennsylvania Institute of CPAs, and Allinial Global firm association. To enable all DGPerry professionals to stay abreast of changes affecting our clients and our profession, our team participates in comprehensive continuing education courses and subscribes to numerous professional publications and resources.

MORE THAN BOOKKEEPING

DGPerry CFO & Advisory Services will help you and your company make the most out of your financial and business goals. We offer a portfolio of services to fit the needs of your company, now and into the future.

Our custom service solutions include financial planning and analysis, budgeting, forecasting, plus a full assessment and enhancement of your accounting software and more! Whatever your company needs, DGPerry will adjust and adapt to maximize your business' potential.

For less than the cost of one qualified CFO, you'll receive a full team of qualified professionals dedicated to helping your business thrive!

QUICKBOOKS ONLINE AND BILL.COM

We utilize QuickBooks Online for cloud-based bookkeeping and Bill.com to process and pay bills for clients. This allows you to easily take pictures of your bills and record them directly into your QuickBooks account for processing approval. Not familiar with these platforms? We also offer transition and training services to familiarize and set up your account.



DGPerry
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A dedicated
DIRECTOR



Liz Buemi, CPA
Director of CFO & Advisory Services

Liz majored in accounting at Ave Maria University in Southwest Florida and is a Certified Public Accountant. She has more than five years of public accounting experience and specializes in helping clients transition to an outsourced CFO model. Liz is treasurer of a southwest Florida-based Women in Business Networking Group, on the Board of the Collier Resource Center, and is a member of the Naples Young Professionals Organization. She prides herself on helping businesses leverage their financial statements to improve efficiencies and make better business decisions.