



HOW AI ELEVATES CFO-LEVEL INSIGHTS FOR SMB'S

AI helps reveal the pattern. We help you decide what to do with them.

THE SMB REALITY (BEFORE AI)

Most SMBs want deeper financial insight—
but without a CFO, visibility can be limited.

AI helps uncover the data.

We help uncover the meaning.



INSIGHT #1: FASTER FINANCIAL VISIBILITY

WHAT USING AI CAN DO

- Surface cash-flow projections
- Identify trends
- Detect anomalies
- Highlight variances

WHAT WE CAN DO

- Prioritize what matters
- Explain risks and opportunities
- Guide decisions
- Turn insights into strategy

You get clarity and direction.



INSIGHT #2: BETTER CASH-FLOW CLARITY

WHAT USING AI CAN DO

- Reveal timing gaps
- Show shortages early
- Map seasonal patterns

WHAT WE CAN DO

- Build cash plans
- Help you decide timing of expenses
- Guide hiring/investment decisions

More cash insight → More cash confidence.



INSIGHT #3: EARLY WARNING SIGNALS

WHAT USING AI CAN DO

- Flag unusual spending
- Spot rising costs
- Identify margin slip
- Alert you to delayed invoices

WHAT WE CAN DO

- Diagnose root causes
- Recommend adjustments
- Prevent small issues from becoming big ones

Problems are likely to stay small because we can intervene early.



INSIGHT #4: SCENARIO PLANNING IN MINUTES

WHAT USING AI CAN DO

- Model pricing changes
- Test hiring decisions
- Project revenue swings
- Simulate tax strategies

WHAT WE CAN DO

- Compare options
- Advise on tradeoffs
- Align decisions with goals
- Plan for the real-world impact

Scenarios → strategy → action.



WHY ADVISORY STILL MATTERS

WHAT USING AI CAN DO

- Provide fast, accurate analysis.

WHAT WE CAN DO

- Add context
- Add judgment
- Add experience
- Add direction

*AI helps show the patterns.
We turn them into a plan.*



AI HELPS GIVES YOU
DEEPER INSIGHT.

A TRUSTED ADVISOR
TURNS IT INTO ACTION.

If you want CFO-level clarity without a full-time CFO, this is where it starts.



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