

AI + AUTOMATION · THE THIRD PILLAR

WORKFLOW FIRST. TOOL SECOND.

Practical AI for Indiana businesses building toward \$3M to \$30M in revenue.

LIMESTONE helps owners decide where AI and automation actually move the needle. Three or four years ago, the math didn't work for lower-middle-market businesses; the gains were swallowed by the cost of getting the data ready. AI changes that math. We work the workflow first, the tool second. AI and data systems are the third pillar of our value-creation model, delivered through trusted partner firms with our oversight.

We don't sell software. We don't take vendor commissions. We're paid by you to find what actually works for your business. Pillar 3 of value creation: financial discipline (CFO Partner), operational execution (Operating Partner), and AI and data systems (delivered through trusted partner firms). The combination is what drives real value creation.

YOU'RE PAYING \$40 AN HOUR TO COPY NUMBERS BETWEEN SPREADSHEETS

WHERE OWNERS GET TIME BACK.



It happens in every business we walk into. A senior person spends 4 to 8 hours per week pulling data, reformatting it, and pasting it somewhere else. That work isn't just expensive. It's the kind of work AI does well now. We help you map it, automate it, and reclaim the time.

SAME DATA, MULTIPLE TIMES

Reporting tasks that touch the same data multiple times each month. A single source of truth, then automated downstream.

CUSTOMER OR VENDOR DATA IN TWO PLACES

Records entered in two systems that should be one. Sync logic and automation eliminate the double-entry and the drift.

PRICING WITHOUT MARGIN DATA

Pricing decisions made without margin data because pulling the data is slow. Automated margin views turn it into a 30-second answer.

AP / AR ON EMAIL AND EXCEL

AP and AR work that runs on email and Excel instead of workflow tools. Approval routing, exception flagging, and matching get automated.

CUSTOM REPORTS BUILT, USED ONCE

Reports that take 3 days to build and get used once. We standardize the recurring view and kill the one-offs.

DOCUMENT-DRIVEN WORKFLOWS

Quotes, contracts, statements, and reports manually assembled. Templated, automated, and routed for review in minutes.

WHAT'S DIFFERENT.

01

OPERATOR-FIRST, NOT VENDOR-PUSHED

Most AI conversations start with the tool and end with confusion. We start with the workflow, and really with the people. Applying AI to a lower-middle-market business is a people problem first, not a technology problem; most teams are in protect mode. We lead with EQ: name what gets easier, name what nobody has to do anymore, free people up for higher-value work. The tools follow the comfort.

02

NO SOFTWARE SALES. NO COMMISSIONS.

We don't sell software. We don't take vendor commissions. We're paid by you to find what actually works. Workflow first, stack second. Adopt and run on the tools you already have, then evaluate the broader stack. *Senior partner involvement throughout, not delegated to a tool jockey.*

3 LEVERAGE, NOT MAGIC.

AI is not magic. It's leverage. The right setup saves 6 to 20 hours a week per person on the right tasks. We measure the savings before we recommend the spend. We'll tell you when AI is and isn't the right answer for your workflow.

START WITH ONE WORKFLOW

We pick the workflow that loses the most senior time, then automate that one first. Measured wins build trust with the team for the next workflow.

MEASURE BEFORE YOU SPEND

We benchmark the time the current workflow consumes, then we measure the post-automation savings. Spend follows demonstrated lift.

PARTNER-DELIVERED IMPLEMENTATION

Our oversight, partner-firm execution. We don't build the implementation in-house. We coordinate the right partner and stay accountable for the outcome.

VALUE CREATION. THREE PILLARS, ONE PLAN.

Most fractional firms specialize in one lane: finance or operations. We do both, integrated under one team. Our finance work sits on the **strategic side**, where value creation lives. We add a third pillar: **AI and data systems**, delivered through trusted partner firms. The **Value Creation Plan** connects all three.

STEPS · EACH EARNS THE NEXT

4 THE PATH IN.

01

FREE

FOUNDATION CHECK

Bedrock Score on our website.
24-hour reply.

02

FREE

CORNERSTONE SESSION

30 to 60 min with both partners.
We name the workflow worth automating first.

03

PAID

WORKFLOW AUDIT

Three to four weeks. We map the workflows and rank by time-saved potential.

04

DELIVER

PARTNER-DELIVERED BUILD

Implementation through a trusted partner firm. Our oversight. Measured against the time-saved benchmark.

THE PEOPLE BEHIND THE WORK

MEET THE TEAM.



JARED LUEGERS, CFA

FOUNDER & OPERATING PARTNER



Builder by instinct, operator by track record, investor by training. Grew the CFA Society of Indianapolis forum from ~120 to 350+ members at the Speedway and served two terms as president. Has run operations through a \$200M strategic sale and separately helped acquire a small Indiana operating business. Founder of OWN Indiana (The Indiana Owner-Operator Network). From Jasper, Indiana.

RYAN ANOSKEY, CPA

CFO PARTNER



Finance-first operator. Builds the systems and runs them with you. 13+ years in transaction due diligence, valuation, audit, and corporate finance, including roles at Roche and Blue & Co. 100+ Quality of Earnings engagements and valuations delivered. From Evansville, Indiana.

NEXT STEP

START WITH YOUR BEDROCK SCORE.

Take the free, scored Foundation Check on our website. We'll respond within 24 hours and name the workflow worth automating first. We'll also tell you when AI isn't the right answer.

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BUILT IN

INDIANA

BEDFORD LIMESTONE COUNTRY

FROM QUARRY TO CAPSTONE · WORKFLOW FIRST. TOOL SECOND.

Indiana's embedded CFO and Operating Partner firm