

FOR CPAS & ACCOUNTING FIRMS



# BEYOND THE BOOKS. INSIDE THE BUSINESS.

*The CFO-level partner that protects (not replaces) the CPA relationship.*

LIMESTONE provides embedded CFO and Operating Partner support for your clients who have outgrown what a fractional CFO can deliver. Most fractional CFOs come from accounting backgrounds; the real value is taking financial results and applying them to the operation. Different work, different minds. We work alongside you, not around you.

## WE STAY IN OUR LANE

### WHAT WE OFFER

Embedded CFO Partner (strategic finance). Operating Partner (drives the value creation plan). Acquisition Partner (deal work).

### TWO OPERATOR-PARTNERS

Jared Luegers, CFA (Founder & Operating Partner). Ryan Anoskey, CPA (CFO Partner; 100+ Quality of Earnings engagements and valuations).

### WHAT WE ARE NOT

No tax, no audit, no bookkeeping. That work stays with you. When we meet a client who needs it, we send them your way.

### BUILT TO GRADUATE

Replaceable by design. Embedded engagements built so your client outgrows us. Healthy exits from Limestone are the goal, not the threat.

*Compensation aligned with the long arc. Retainer for the work we do, and equity participation if the business actually wins. No commissions. No success fees. No referral kickbacks. Your scope is protected.*

WHEN YOUR CLIENT NEEDS MORE THAN A FRACTIONAL CFO

# SEVEN TRIGGERS TO REFER.



## 01 CLIENT IS DOING A DEAL

Buy-side or sell-side. Needs CFO-level support for diligence, deal modeling, or post-close integration.

## 03 MULTI-SITE OPERATIONS

P&L by location, operating rhythm, accountability across managers. More than the CPA seat alone.

## 05 OUTGROWN FRACTIONAL CFO

Client has outgrown a fractional CFO. Needs operator mindset, not more accounting depth.

## 02 2-TO-7 YEAR TRANSITION

Owner preparing to exit. The multi-year operating prep that builds the multiple.

## 04 SUCCESSION GAP

Internal succession structure explored before the bench is ready. We build the bench.

## 06 REVENUE CEILING 24+ MO

Profitable but stuck. Cap is operating, not financial. We drive the value creation plan.

## 07 QOE BELOW YOUR THRESHOLD

Sub-\$2M EBITDA QoE engagements your firm would otherwise decline. **Limestone takes those, you stay in the relationship.** Never above \$3M EBITDA. That goes back to you.

## YOUR CLIENT'S PATH

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 binding constraint.

03

PAID

### QUARRY-TO-CAPSTONE DIAGNOSTIC

Three to four weeks. Capstone Report delivered.

04

ENGAGE

### LIMESTONE ENGAGEMENT

Advisory or Embedded. Driven by **Value Creation Plan**. 1 to 4 years.



#### JARED LUEGERS, CFA FOUNDER & OPERATING PARTNER

Builder by instinct, operator by track record, investor by training. Founder of OWN Indiana. Has run operations through a \$200M strategic sale and separately helped acquire a small Indiana operating business. From Jasper, Indiana.



#### RYAN ANOSKEY, CPA CFO PARTNER

Finance-first operator. 13+ years in transaction due diligence, valuation, audit, and corporate finance. 100+ Quality of Earnings engagements and valuations delivered. From Evansville, Indiana.

#### MAKE A WARM INTRO

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BUILT IN INDIANA  
BEDFORD LIMESTONE COUNTRY

FROM QUARRY TO CAPSTONE · WE STAY IN OUR LANE

Indiana's embedded CFO and Operating Partner firm