

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. Many of your clients are still working with the accountant who became their accountant when the business was a sole-prop, that work served its purpose, but a \$3M business with a leadership team needs a forward-looking finance seat alongside the tax and compliance work that stays with you. We work alongside you, not around you. Indiana's embedded CFO and Operating Partner firm for the lower middle market.

*We stay in our lane. No tax. No audit. No bookkeeping. We'd refer those to you. Compensation aligned with the long arc: retainer for the work, equity participation if the business wins. No commissions. No success fees. No referral kickbacks.*

WHAT WE DO · AND WHAT WE DON'T

## WE STAY IN OUR LANE.



### WHAT WE OFFER

**Embedded CFO Partner:** strategic financial decisions, KPI dashboards, cash forecasting, lender and board reporting.

**Operating Partner:** drives the value creation plan. Strategy, operating cadence, leadership team build, commercial and operational levers.

**Acquisition Partner:** buy-side diligence, capital coordination, post-close integration.

**Three pillars:** financial discipline, operational execution, AI and data systems (delivered through trusted partner firms).

### WHAT WE ARE NOT

**Tax preparation, compliance, or planning.**  
That work stays with you.

**Bookkeeping or month-end close mechanics.**  
That work stays with you.

**Audit, review, or attestation engagements.**  
That work stays with you.

**QoE work above \$3M EBITDA.**  
That work stays with you. Our sweet spot is sub-\$2M EBITDA QoE: the deals below the upmarket firms' threshold.

*When we meet a client who needs these, we send them your way. No exceptions.*

### ON QOE WORK · THE FRIENDLY CATCHER

Upmarket QoE firms won't take engagements below their thresholds. The sub-\$2M EBITDA deals fall through the cracks. **Limestone takes those. You stay in the relationship for everything else.** Ryan brings 100+ Quality of Earnings engagements to that work. Operator-grade rigor, sized for smaller deals. We coordinate with you on every referral, never compete for your upmarket business.

## HOW WE EMBED.

**CFO Partner:** operators who do finance. Monthly close coordination with you, KPI dashboards, cash forecasting, lender and board reporting, capital raise prep, exit prep.

**Acquisition Partner:** operators who do deals. Buy-side diligence, deal modeling, capital coordination, 100-day plans, post-close integration.

**Operating Partner:** operators who drive the value creation plan. Strategy, KPI dashboard, operating cadence, talent build, commercial and operational levers, outside accountability.

*Refer any client where the numbers don't answer the question, where strategy is fine but execution isn't happening, or where a deal is in motion.*

WHEN YOUR CLIENT NEEDS MORE THAN A FRACTIONAL CFO



# 7 TRIGGERS TO REFER.

You see your clients more often than anyone. When you see these patterns, the introduction will land.

## CLIENT IS DOING A DEAL

Buy-side or sell-side. Client needs CFO-level support for diligence, deal modeling, capital coordination, or post-close integration.

## 2-TO-7 YEAR TRANSITION WINDOW

Owner preparing for a transition. The multi-year operating prep work that builds the multiple, fixes owner-dependency, and gets the business diligence-ready.

## MULTI-SITE OPERATIONS

Multi-site operations need a P&L by location, a working operating rhythm, and accountability across managers. The CPA seat alone can't deliver that.

## INTERNAL SUCCESSION GAP

Internal succession structure is being explored before the leadership bench is ready. We build the bench, document the systems, and reduce owner-dependency.

## OUTGROWN A FRACTIONAL CFO

Client has outgrown a fractional CFO who is functionally an accountant. They need an operator mindset on strategic finance, not more accounting depth.

## REVENUE CEILING 24+ MONTHS

Client is profitable but stuck at a revenue ceiling for two-plus years. The cap is operating, not financial. We drive the value creation plan that breaks through.

## QOE WORK BELOW YOUR THRESHOLD

Sub-\$2M EBITDA QoE engagements your firm would otherwise decline. Limestone takes those, you stay in the relationship for everything above. We never take QoE above \$3M EBITDA.

STEPS · YOUR CLIENT EARNS EACH ONE

# 4 YOUR CLIENT'S PATH.

01

FREE

## FOUNDATION CHECK

Your client gets their **Bedrock Score** on our website. 24-hour reply.

02

FREE

## CORNERSTONE SESSION

30 to 60 minutes with both partners. We name the binding constraint.

03

PAID

## QUARRY-TO-CAPSTONE DIAGNOSTIC

Three to four weeks. Your client receives the **Capstone Report**.

04

ENGAGE

## LIMESTONE ENGAGEMENT

Advisory or Embedded. Driven by your client's **Value Creation Plan**. 90-Day Plan as the first deliverable.

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. Founder of OWN Indiana (The Indiana Owner-Operator Network). 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. 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

# MAKE A WARM INTRO.

The cleanest way to refer is a one-line email introducing your client to Jared. We take it from there with a free Cornerstone Session. No commissions, no contracts, no kickbacks. Just goodwill and reciprocity.

### CONTACT

**Email** [jared@limestonesp.com](mailto:jared@limestonesp.com)

**Phone** 317.820.2468

**Web** [www.limestonesp.com](http://www.limestonesp.com)



BUILT IN

## INDIANA

BEDFORD LIMESTONE COUNTRY

FROM QUARRY TO CAPSTONE · WE STAY IN OUR LANE