

LIMESTONE STRATEGIC PARTNERS

RUNS WITHOUT YOU. WORTH MORE.

Investor-grade clarity. Operator-level execution.

Indiana's embedded CFO and Operating Partner firm for owners building toward \$3M to \$30M in revenue. In owner-led businesses, finance and operations aren't separate functions. The same decision moves cash, the team, and the next quarter at once, and that intersection is where value gets created or lost. We embed inside your business, drive the Value Creation Plan, and build the leadership team that runs it.

Fractional CFOs report. Operators drive. We're operators who do finance, in the room when the operating decisions get made. We learn how your business creates value, then build and drive the Value Creation Plan that compounds it.

HOW WE EMBED.



Three core seats inside your business. CFO Partner and Operating Partner form the recurring monthly partnership. Acquisition Partner is project-based, engaged when you're sourcing, diligencing, financing, or integrating a deal.

01 CFO PARTNER

Operators who do finance. Most owners we work with got to \$2M, \$5M, even \$10M on instinct, and the instinct is real. The CFO Partner is the seat that makes the instinct accountable when the business hits a covenant call, a buyer's diligence, or just hits the limit of what a transactional accountant was built to do. Monthly close, KPI dashboards, cash forecasting, lender and board reporting. Financial and operational data flow through the CFO seat so analytics run on real information, not estimates.

02 OPERATING PARTNER

Operators who drive the Value Creation Plan. We learn your business first, then build the plan with you and your team. Strategy ownership, KPI dashboard, leadership meetings and operating rhythm, leadership team build (right people in right seats, hiring, upgrades), commercial levers (pricing, sales effectiveness, customer concentration), operational levers (working capital, process, productivity), owner coaching, and outside accountability that gets things moving and documented.

03 ACQUISITION PARTNER

When you're ready to acquire, we cover deal sourcing, diligence, financing, and post-close integration that extends into a full Embedded partnership until the acquired business is stable.

VALUE CREATION. THREE PILLARS, ONE PLAN.

Most fractional firms run one lane: finance or operations. We run both, integrated under one team, and we add a third pillar most firms don't: **AI and data systems**.

The three play off each other. Finance gives operations the truth on cash and capital. Operations gives finance the levers that move the numbers. AI and data systems make both run on real, integrated information instead of stale spreadsheets and manual work. Take any one away and the other two run on partial information.

Accounting and bookkeeping are different disciplines; we work alongside your CPA on those. For **implementing AI and data systems**, we bring in trusted partner firms and use the best one for the job. The **Value Creation Plan** holds the three together: a written, quarterly-updated operating plan that defines what we drive together over the partnership.

TWO PATHS, ONE FIRM

CHOOSE YOUR PARTNERSHIP.



OPTION A

LIMESTONE ADVISORY.

Biweekly or monthly meetings with both partners. Senior judgment on the operating decisions that move the business, outside accountability between meetings, and access to both partners when something breaks. *Best fit for owners with a strong internal team who want a steady cadence and an outside perspective they trust on the calls that compound.*

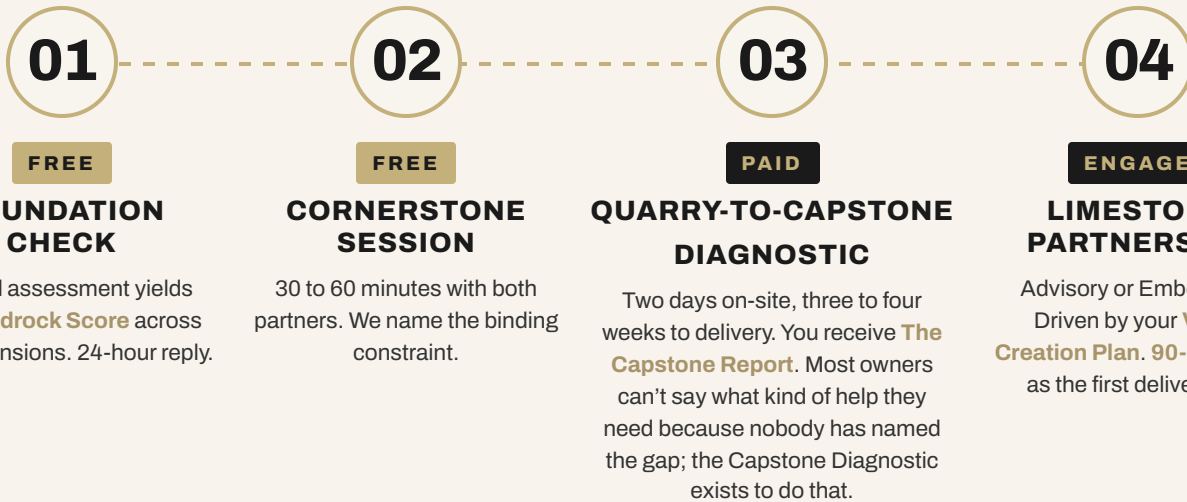
OPTION B · FLAGSHIP

LIMESTONE EMBEDDED.

CFO Partner and Operating Partner inside your business. We sit in your leadership meetings, log into your financial systems, and pick up the phone when the lender or the buyer calls. **In the work daily, not on a meeting schedule.** Designed to step out over time as your team grows into full-time CFO and COO seats. **Equity participation in most partnerships:** the retainer covers the work, the equity ties our outcome to yours.

STEPS · EACH EARNS THE NEXT

THE PATH IN.



WHAT THE PARTNERSHIP PRODUCES

Built and refreshed inside the partnership, in the work with you.

A partner in the decisions on cash, hiring, pricing, and the moves that compound.

A written Value Creation Plan, updated quarterly.

A leadership team and bench that can run the business without the owner being the bottleneck.

A KPI dashboard tied to the plan.

Diligence-ready financials for any next-chapter event (raise, refinance, exit).

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 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. You get your Bedrock Score across five dimensions in under 10 minutes. We respond within 24 hours with the right next step.

CONTACT

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BUILT IN

INDIANA

BEDFORD LIMESTONE COUNTRY