



# STRATEGIC FINANCE SUPPORT

## HAVE YOU EVER THOUGHT...

- *Why is the cashflow for our organization so tight?*
- *Will our organization be able to make payroll this week?*
- *Why are our expenses so high?*
- *Why do we get so many surprises in our financial statements that I didn't know about?*
- *Are my organization's internal controls really in place effectively?*



*...You are not alone!*

## NEXO GROUP CAN HELP

Empower your nonprofit with our outsourced strategic financial services. Navigate the complexities of nonprofit finance with ease and confidence with assistance from our experts with over 30 years of experience.. Our team will help you define clear financial goals, assess your current financial process, and develop a strategic roadmap to drive transformational results and efficiency. Benefit from our integrated approach across finance, technology, strategy, and operations. With our client-centric model, we ensure your financial strategies align perfectly with your mission.

## PROFESSIONAL SERVICES



### Budgeting

Examining revenue and expenses to analyze and create budgets using an inclusive model.



### Dashboards & KPIs

Select, track, analyze and report key metrics for informed decision making.



### Cashflow Forecasting

Understand current cashflow and develop a model for cash forecasting.



### Policy & Procedure Development

Developing finance policies and procedures to reinforce robust internal controls.



### Expense Management

Analyzing expenses, identifying trends, developing and implementing tools.



### Revenue Management

Revenue recognition, tracking and optimization support.



### VCFO

Strategic finance support from an experienced CFO.





## COLLABORATION IS OUR METHODOLOGY

Nexo Group believes that a collaborative model is key to a successful consulting experience that adds value to our clients. In support of that belief, we begin our work with a thorough review of organizational strategy, goals, and process. We then work with leaders to collectively develop a solution-driven approach to address identified challenges in alignment with organizational goals and strategy. We believe that, by integrating our comprehensive knowledge and skillsets with the organizational experience of our clients, together we derive complete solutions to maximize value for their organizations. The main objective is to optimize organizational success through a client-centric cross-functional collaborative model.



## OUR CLIENTS ARE OUR COMMUNITY

Nexo Group focuses its practice on small to mid-sized businesses, and Not For Profit entities; two industry segments that historically have been underserved by progressive professional services. We provide tools previously not utilized in these segments that drive value and organization efficiency. When these tools are utilized in our collaborative model, we believe that the optimum environment for success is created. When this environment is integrated with the capabilities of our team, we deliver holistic solutions to our clients that provide a roadmap for implementation that is achievable and can be completed in a timeline that allows for organizational success.



## OUR PEOPLE ARE OUR STRENGTH

Nexo Group, LLC is an experienced team led by José A. Rosario III and John M. Pennell. These two individuals have tactical and leadership acumen in a wide array of industries and functional areas allowing them to provide insight to our clients in innovative ways. Collectively, our team has 80+ years of practical experience as finance, technology and operations experts across many business verticals including nonprofit, insurance, healthcare, manufacturing and professional services. Our consultants are experienced partitioners who understand the unique challenges of working in dynamic environments and they bring that valuable perspective to each client engagement.



**José A. Rosario III, MBA**

*Principal / Owner*

Throughout his career spanning more than 30 years, **Mr. Rosario** has provided technical and leadership expertise in the assessment, development, implementation, and management of technology solutions. These efforts have generated demonstrated value for organizations of all sizes and business sectors including enterprise, manufacturing, small business, not-for-profit, and healthcare. Over the last decade, he has served as a primary strategist for his clients in the optimization of business processes, cybersecurity hardening, and organizational efficiency. His core competencies include business analysis and assessment, strategic information planning, data management, risk mitigation solution strategy, business case development, project valuation, and project management.



**John M. Pennell, MS**

*Principal / Owner*





Mr. Pennell is a dynamic leader and business strategist with demonstrated success in all aspects of executive leadership, operations and finance evidenced by a successful career that spans more than three decades. During the last 30 years, he has served as a member of multiple C-Suite Teams providing primary leadership in all aspects of organization operation and finance with demonstrated success. In addition to his leadership expertise, he has also significant experience as an educator teaching financial analytics and managerial accounting at the graduate level. His core competencies include streamlining technical, financial, and operation processes through the effective use of analysis, process improvement, and project management tools.

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