



WHO IS WFC?

Wise Financial Consulting is a specialized financial consulting firm providing interim and fractional accounting, finance, and M&A advisory services. We work across multiple industries with deep specialization in electronic security and fire & life safety.

With over 250 companies served in 12+ years, Wise brings experienced, operator-level financial leadership to businesses navigating growth, complexity, and transactions.

Founded in 2014 by Ken Wiesenfeld, former CFO of two electronic security companies, Wise was built to solve the real-world financial challenges owners and leadership teams face.

HOW WE HELP

CORE SERVICES

Operational Accounting Support

Cleanup and reconciliation, process improvement, financial reporting, and team support tailored to your operations.

Financial Planning & Analysis (FP&A)

Dashboards, forecasting, and budgeting that turn data into clear, actionable insight.

Sell-Side Advisory

Financial readiness, diligence support, positioning, and full sale process guidance.

Buy-Side Diligence & Integration

Hands-on financial diligence, integration planning, and post-close execution.

SPECIALTY SERVICES

BILLING & COLLECTIONS

- Improved and more predictable cash flow
- Measurable reductions in aging receivables
- Faster resolution of billing disputes and service misalignment

PEOPLE & HR

- Clear policies, and consistent manager practices
- Manager coaching, and performance management tools
- Hiring, onboarding, workforce planning, and multi-state guidance

TAX DILIGENCE & RESEARCH

- A clear, documented view of sales, payroll, and income tax exposure
- Diligence findings that hold up under buyer or seller scrutiny
- A resource to answer tax questions as they come up

WISE AI

- Reporting packages built, refreshed and formatted faster
- Data analytics across operational and financial data, including what lives in your ERP
- Owners finally get information and answers out of their transaction data
- We build using Claude



Contact information
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Scope of Services Summary

OPERATIONAL ACCOUNTING

- Monthly Close
- GL/Trial Balance Ownership
- Billing and Collections
- Procure to Pay
- Job Costing
- Payroll
- Cash Management
- Internal Controls
- Accounting System Transitions
- SOP Development
- Internal Staff Training & Transition

FINANCIAL PLANNING & ANALYSIS (FP&A)

- Financial Reporting
- Key Metric Reporting
- Bank Reporting
- Budgeting
- Cash Forecasting
- Long-Term Financial Modeling
- Ad Hoc Analysis
- Business Valuation Analysis
- Growth Initiative Planning
- Cost Containment Analysis

SELL-SIDE ADVISORY

- Preparation and Readiness Implementation
- Data Room Build Out
- Business Positioning for Sale
- Marketing Materials and Buyer Outreach
- Access to Qualified Buyers
- Project Management of Diligence to close
- Post-Close Support

BUY-SIDE DILIGENCE & INTEGRATION

- Diligence Coordination and Project Management
- Integration Coordination and Project Management
- Buy-Side Software Support (Midaxo)
- Accounting Integration and Post-Close
- Purchase Accounting
- CIM Review and LOI Support

WHY WISE?

- 100+ years of combined accounting & finance experience
- Deep industry knowledge in Fire & Security
- Flexible, fractional, and long-term engagement model



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