LEGACY SOLUTIONS

SERVICE BROCHURE · NOVEMBER 2026

CFO ADVISORY

The financial leadership your business needs, without a full-time CFO.

Monthly reporting, cash flow and lender-ready numbers, so you can make decisions with confidence and grow.

Every legacy starts with a plan. Don't just make money, build wealth that outlives you.

Book your free 45-minute consultation or call 345-925-9810

WHERE YOU ARE TODAY

Running the business, but flying without instruments?

→

WHERE WE TAKE YOU

Picture month-end with your numbers ready, your cash flow mapped and your next financing within reach.

US$157M+	Since 2018	13 weeks	Free
financing secured for clients	advising Cayman businesses	rolling cash flow forecast	45-minute first consultation

YOUR CONSULTANT

Lori Moncrieffe

Founder & Consultant, Legacy Solutions
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THE CHALLENGE

Running the business, but flying without instruments?

01 Month-end numbers arrive late, if at all.

02 Cash is tight and it is hard to see what is coming in the next quarter.

03 A bank or investor asks for projections and a business plan, and they are not ready.

"You built the business. You shouldn't have to guess how it's doing."



YOUR GUIDE

Corporate finance experience, on your side of the table

Lori Moncrieffe, MSc, CAMS · Founder & Consultant

Lori spent over 15 years in commercial banking, credit adjudication and corporate finance, so we know what lenders and investors expect to see and how to present your business to them. We are issuer-neutral and earn no commission from any bank, so our advice is built around what is best for your business.

- US$450M+ structured across her career
- Wharton Real Estate Investing & Analysis
- John Maxwell Certified Coach and Speaker
- DISC Behavior Consultant

WHY CLIENTS CHOOSE LEGACY SOLUTIONS

Issuer-neutral
Not aligned to any bank or product issuer.

Lender-ready numbers
Built to bank and investor standard.

No long lock-in
A 3-month minimum, then 30 days' notice.

Fees agreed up front
Confirmed in a written engagement proposal.

WHAT'S AT STAKE

A cash crunch or missing numbers can stall your growth, or cost you the financing when you need it most.

WHAT SUCCESS LOOKS LIKE

Picture month-end with your numbers ready, your cash flow mapped and your next financing within reach.

THE PLAN

Three steps to clear numbers

01

Free consultation

A 45-minute call to review your numbers, your goals and any financing you are planning.

02

Set up

We build your monthly reporting, a KPI dashboard and a rolling 13-week cash flow around how your business runs.

03

Monthly CFO support

Reporting with executive commentary, one-on-one sessions and lender-ready numbers when you need financing.

YOUR ROADMAP

How CFO Advisory works: who does what, and when the fees apply

01	**Free consultation** A 45-minute call on your numbers, your goals and any financing you are planning.	**Client and Legacy** No fee
02	**Proposal** CFO Essentials, Fractional CFO or CFO Plus, confirmed in writing.	**Client signs** Monthly in advance; 3-month minimum
03	**Your numbers** Financial statements, management accounts and key agreements.	**Client provides**
04	**Set up** Monthly reporting, a KPI dashboard and a rolling 13-week cash flow.	**Legacy delivers**
05	**Monthly reporting** Your numbers every month, with executive commentary.	**Legacy delivers**
06	**One-on-one sessions** Regular sessions to review the numbers and make decisions.	**Client and Legacy**
07	**Lender-ready when you need it** Projections, a 3-year business plan and your financing package.	**Legacy delivers** Business Plan CI$2,000; 1% success fee

YOUR RHYTHM WITH A CFO

EVERY MONTH
Reporting with executive commentary, your KPI dashboard and an updated 13-week cash flow.

YOUR SESSIONS
Two one-hour sessions a month (Essentials) or four (Fractional CFO and CFO Plus).

WHEN YOU RAISE CAPITAL
Projections, a 3-year business plan and a lender-ready package.

YOUR INVESTMENT

Clear fees, agreed in writing

Published fees in Cayman Islands dollars, confirmed in writing before any work begins.

THREE LEVELS OF CFO SUPPORT

LEVEL ONE
CFO Essentials
Clear numbers, every month.
6 HOURS A MONTH
CI$2,100 a month

LEVEL TWO
Fractional CFO
A CFO in your corner.
12 HOURS A MONTH
CI$3,600 a month

LEVEL THREE
CFO Plus
Ready for your next financing.
18 HOURS A MONTH
CI$5,400 a month

CFO Essentials retainer (6 hours a month)	CI$2,100 / month
Fractional CFO retainer (12 hours a month)	CI$3,600 / month
CFO Plus retainer (18 hours a month)	CI$5,400 / month
Business Plan, 3-year	CI$2,000
Ad hoc advisory	CI$675 / hour
Financing success fee	1% of capital secured

Retainers are paid monthly in advance with a 3-month minimum term and 30 days' notice after that. Additional hours for retainer clients are CI$300 an hour.

YOUR NEXT STEP

Book your free 45-minute consultation

We review your numbers, your goals and any financing you are planning, and recommend the right level of support.

Book a consultation

45 minutes · no cost · no obligation

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