

I already do the pre-accounting and the post-accounting. I'm buying the firm in the *middle*.

Most firms only do the compliance in the middle. The work clients increasingly need sits on both sides of it: clean data going in, real decisions coming out, and their accountant rarely has the time or the tools for either. That work, the pre- and post-accounting, is the kind of work I already do through **DataBuddy**, my data consulting practice.

PRE-ACCOUNTING

The data that goes in

- Data cleanups
- Technical reconciliation
- Revenue recognition
- Payment processing
- Operations software integrations

THE COMPLIANCE CORE

The firm, kept intact

- Bookkeeping
- Payroll
- Tax preparation
- Tax planning
- Filings & compliance

POST-ACCOUNTING

The value that comes out

- CFO-level forecasting
- Dashboards
- Reporting
- Lifetime value (LTV)
- Customer acquisition cost (CAC)

WHY I AM BUYING A FIRM

I connect the three layers, so your clients finally have one team that sees the whole picture.

- 1 Modernize the firm with technology.** Automation handles the routine and keeps the books current, with a person still reviewing every number, so the team spends its real time understanding each client's business.
- 2 Win the planning work that time unlocks.** A \$1K-a-year tax client can become a \$1K-a-month planning client, because the team now knows the business well enough to advise it.
- 3 Go beyond traditional accounting.** Add the pre- and post-accounting and a client can reach \$10K a month, the rate DataBuddy clients already pay. The firm brings the client base, the capability is already built.

Your team and the relationships you've built are what make a firm like yours worth buying. I'm here to build on what works.

THE BUYER

I am not a CPA, and that is the point.

I am not here to absorb your book or run a private-equity playbook. The licensed work stays with the CPAs on the team, exactly as it does today. What I add is the technical layer most firms cannot build.

THE TECHNICAL SIDE

15 years building data and finance systems at Snowflake, LinkedIn, and TripAdvisor. M.S. Applied Mathematics, FMVA, CTEC Registered Tax Preparer, QBO ProAdvisor, EA in progress. Multi-entity books reconciled to the penny, and a **\$100K+** result self-representing an IRS review.

THE OPERATOR SIDE

Built my own business, consulted for private equity acquiring HVAC firms, and bought and ran a franchise territory. I have seen the pre, the post, and the inside of a deal.

WHAT I AM LOOKING FOR

THE FIT

Location	N. California, virtual, or virtual-ready
Team	At least 2: a senior and a junior
Clients	Entrepreneurs, SMBs, HNWI's
Services	Recurring work, light on audit & attest
Economics	\$250K to \$1M SDE

READY TO MOVE

\$1,000,000

liquid, plus SBA pre-qualification through Pioneer Capital Advisory.

I move as soon as I find the right firm, and I shape the deal around what you need. What I care about most: a **transition timeline** that protects your clients, and an **earnout tied to real metrics** so we stay aligned to the same outcome.