

OUTSOURCED SOLUTIONS PACKAGES

Strategic financial partner for SMEs

- Many SME owners excel at delivering their core service or product, but lack the financial tools and expertise to measure success, manage costs, and make strategic decisions.
- They focus on top-line growth (sales/revenue) but ignore bottom-line impact (profit/cash).
- They don't track or understand KPIs, especially non-financial ones.
- Budgeting, forecasting, and cost control are either non-existent or reactive.
- They often learn about a problem only after it has impacted the business — when it's too late to fix.
- Financial data is often underutilized, and non-financial performance data is completely ignored.
- Strategic opportunities (e.g., big contracts, funding, M&A) are lost or mismanaged due to poor financial planning.

WE OFFER FULLY INCLUSIVE PACKAGES TO
SUPPORT YOUR ORGANISATION

Our solutions will offer you Cross-Cutting Benefits (Reinforced Across All Tiers):

- Outsourced = no HR/employment hassles
- Scalable = grows with your business
- Professional = governed by CIBA, SAIT, ACCA
- Strategic = not just compliance, but insight
- Transparent = clear scope, monthly fee, no surprises

**Note: A custom quote can be prepared should the needs exceed the standard offerings.*



OUTSOURCED SOLUTIONS PACKAGES

Outsourced Accountant

Reliable Compliance with a Value-Add Edge

Access to qualified accounting professionals without the cost and overhead of hiring in-house staff.

- Ensures full compliance with SARS, CIPC, UIF, COIDA, etc., while keeping the books clean, accurate, and up to date.
- No employment risk — no need to worry about leave, PAYE, recruitment, or retention issues.
- Flexible engagement — ideal for SMEs that can't justify a full-time accountant but still need structured financial records and routine reporting.
- Foundation for scaling — by outsourcing early, SMEs establish strong financial habits and reporting standards that make future funding, audits, or internal growth smoother.
- More than a bookkeeper — gain access to accountants who can spot risk, inefficiencies, and compliance gaps before they escalate.

Ideal For:

Start-ups, small businesses, or solo entrepreneurs who want proper compliance and routine support but aren't yet at the stage where monthly management reporting or forecasting is required.

Outsourced Financial Manager (FM)

Bridge Between Operations and Strategy

Operational finance expertise for a fraction of what a full-time FM would cost.

- Covers cash flow management, budgeting, cost control, and performance monitoring — giving you the tools to manage your business proactively rather than reactively.
- Prepares the business for scale by instilling financial discipline and establishing control systems and dashboards.
- No idle time costs — pay only for the services you need at the scale you need them.
- Focus on strategic decision support — instead of your team compiling reports, your FM will explain what the numbers mean and what actions to take.
- Keeps your business investor- or lender-ready by maintaining structured working capital and financial practices.

Ideal For:

Growing SMEs that have outgrown basic bookkeeping but don't yet need a CFO. Great for companies looking to monitor performance, control costs, and plan growth with greater precision.

Outsourced Financial Director (FD) / Chief Financial Officer (CFO)

Executive-Level Strategy Without the Executive-Level Cost

Board-level financial leadership, strategic thinking, and forecasting — without the full-time price tag.

- Helps guide the business through growth, funding, restructuring, or investment decisions.
- Handles financial strategy, risk management, stakeholder engagement, and high-level governance.
- Ideal for SMEs needing guidance through capital raising, M&A support, or financial turnaround situations.
- Serves as a sounding board for founders or directors, bringing perspective from corporate finance and strategic planning.
- Keeps your business focused on value creation and sustainable long-term planning.
- No equity dilution or full-time salary burden — retain control while accessing world-class financial leadership.

Ideal For:

SMEs approaching a growth inflection point, looking for funding, or navigating complex decisions but not ready to hire a full-time CFO. Also valuable for companies preparing for exit, acquisition, or investor onboarding.

OUTSOURCED SOLUTIONS PACKAGES

Outsourced Accountant	Outsourced Financial Manager (FM)	Outsourced Financial Director (FD) / Chief Financial Officer (CFO)
Standard monthly accounting services with payroll management	Enhanced monthly accounting services including payroll and VAT filings	Comprehensive monthly accounting package covering payroll, VAT, and personal income tax returns
R 5 000 - R9 000	R 10 000 - R15 000	R 15 000 - R25 000

Monthly pricing from Valid 1 March 2025 - 28 February 2026

OUR OUTSOURCED SOLUTIONS PACKAGES INCLUDE ALL BASIC COMPLIANCE ITEMS, NAMELY:

- Bank Reconciliation
- Annual Financial Statements
- Company Provisional Tax: Bi-annual
- Company Income Tax: Annual
- Payroll Services: Preparation of weekly/monthly payslips, Maintenance of all leave types, Monthly (EMP201), Bi-annual (EMP501)
- Accounting Platform Access
- Monthly Management Accounts
- Tax Clearance Certificates
- Value Added Tax (VAT)
- Individual Tax Services for all Directors: Annual income tax, Bi-annual provisional tax
- Dividend Tax Returns
- CIPC Maintenance: Annual
- CIPC Beneficial Ownership Submissions: Annual

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OUTSOURCED SOLUTIONS OFFERING

Role	Timeframe	Focus Area	Key deliverables
Accountant	Short-term	Daily/weekly operations, compliance, record-keeping	Monthly Management Accounts
Financial Manager	Medium-term	Operational planning, performance monitoring	Quarterly forecasts and variance reports
Financial Director/CFO	Long-term	Strategic direction, capital structuring, governance	Annual strategic financial plan

CORE FINANCIAL OPERATIONS

Task / Category	Accountant	Financial Manager	Financial Director/CFO
Bank reconciliations, transaction records	✓	✓	✓
Accounts payable/receivable (debtors/creditors)	✓	✓	✓
Creditor payments on the bank	✓	✓	✓
Payroll payments to staff	✓	✓	✓
General ledger, trial balances	✓	✓	✓
Tax compliance and submissions	✓	✓	✓
Payroll & statutory compliance	✓	✓	✓
Audits (external)	✗	✓	✓
Working capital management	✗	✓	✓

OUTSOURCED SOLUTIONS OFFERING

FINANCIAL PLANNING & ANALYSIS

Category	Accountant	Financial Manager	Financial Director/CFO
Budgeting	✗	✓	✓
Performance measurement	✗	✓	✓
Cost control & management	✗	✓	✓
Cash flow management - Short term	✗	✓	✓
Cash flow management (Treasury) - Long term	✗	✗	✓
Financial analysis	✗	✗	✓
Financial planning	✗	✗	✓

LEADERSHIP & GOVERNANCE

Area	Accountant	Financial Manager	Financial Director/CFO
Policy setting	✗	✗	✓
Internal control frameworks	✗	✗	✓
Team management	✗	✗	✓
Stakeholder engagement	✗	✗	✓
Board engagement	✗	✗	✓
Change management	✗	✗	✓

OUTSOURCED SOLUTIONS OFFERING

STRATEGIC MANAGEMENT TOOLS & TECHNIQUES

Tool / Model Category	Accountant	Financial Manager	Financial Director/CFO
Strategic tools	✗	✗	✓
Value-based management (VBM)	✗	✗	✓
Performance management and evaluation	✗	✗	✓
Risk management	✗	✗	✓
Tax structuring and planning	✗	✗	✓
Capital raising & investor relations / M&A support	✗	✗	✓
Environmental tools (ESG considerations / sustainability reporting)	✗	✗	✓



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