



What Unique Challenges Do Private Equity-Backed Company CFOs Face?

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Houlihan Lokey

Challenges for Private Equity Firms and CFOs

Modern Chief Financial Officers are facing increased challenges and demands from financial sponsors, boards, and other stakeholders, all while dealing with macroeconomic headwinds.



The increased cost of doing business puts pressure on margins.



Expanding hiring strategies to focus on resource optimization, tech, and AI.



PE relies on data for strategic decisions. High data volume increases complexity.



High interest rates have changed investing dynamics and capital allocation.



Increasing risk and compliance requirements.



PE firms increased their focus on digital disruption and transformation.

Our Service Offerings

1 Finance Transformation

- Office of the CFO Maturity Assessment of Portfolio Companies
- Enhance, Analyze, and Refine Processes
- Monthly Close Optimization

2 Financial and Management Reporting

- Management Reporting, Board Reporting, and Lender Reporting
- Purchase Accounting and Purchase Price Allocation Valuation Support
- Financial Statement Preparation and Audit Support

3 Financial Planning and Analysis

- Strategic Planning, Budgeting, and Forecasting
- Thirteen-Week Cash Flow Modeling and Liquidity Reporting

4 Information Technology

- IT Strategy and Roadmap
- IT Vendor Selection and Diligence
- Cyber Readiness and Threat Assessments

5 Digital and Data Analytics

- Portfolio Reporting and Analytics
- Dashboarding and Visualization
- Analytics-Driven Value-Creation Services

6 Tax Services

- Ongoing Tax and Regulatory Compliance
- Tax Planning Services

Partner With Houlihan Lokey

Key Benefits for Private Equity Firms and Portfolio Company CFOs:

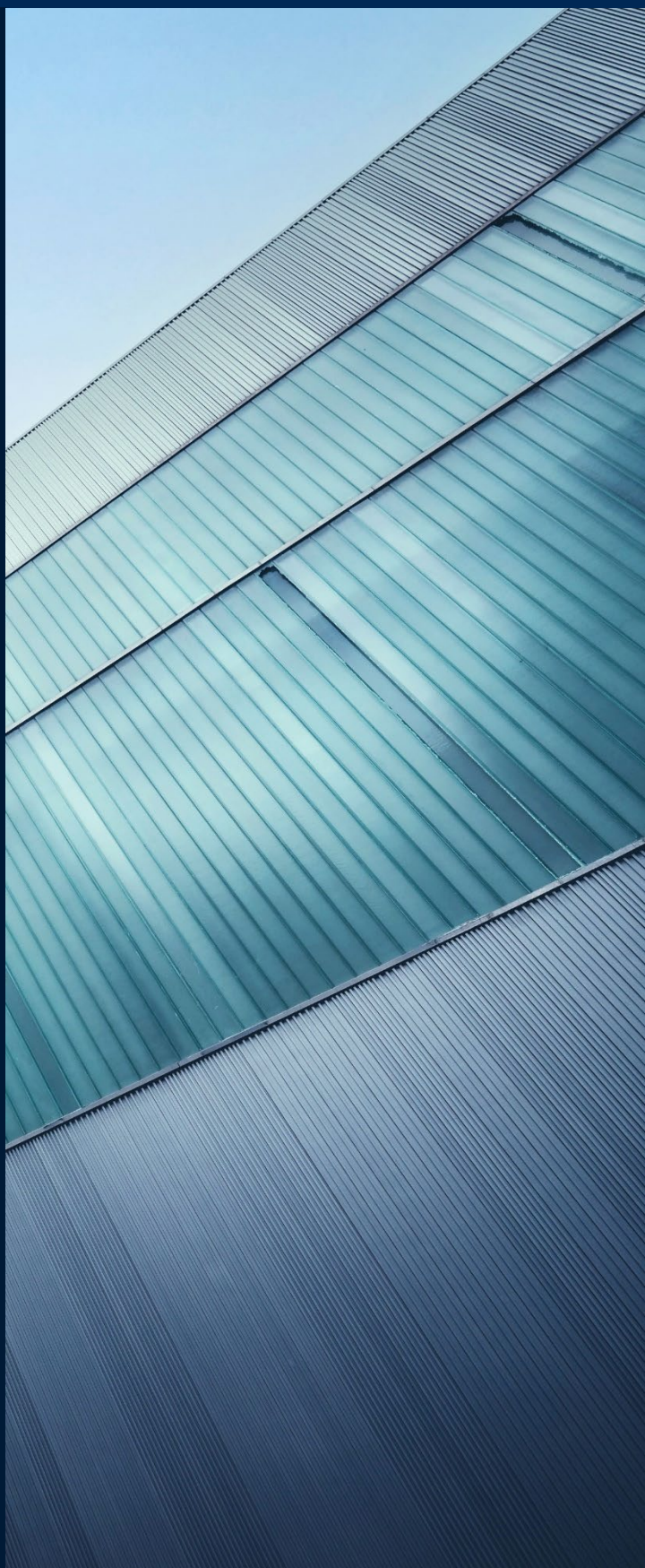
Enhanced financial and management reporting using data analytical tools to make better-informed decisions.

Assessment and remediation of financial processes for strategic advancement and operational efficiency.

Key financial planning and analysis insights to enable growth.

Reshaping of the finance function to support the implementation of new technologies and leading practices.

Enhanced performance through improved processes and controls.



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Contact Us

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