

The Fractional CFO \$5K+ Offer Menu

How to Package and Price High-Retainer CFO Services Without Custom Quotes, Scope Creep, or Awkward Sales Calls — Even If You’ve Never Formalized Your Offer Before

HOW TO USE THIS GUIDE

This is not a theory piece and it’s not meant to be “read once and forgotten.” Use this as a **working asset**. You can:

- 1. Copy it directly into your proposals
- 2. Use it to anchor pricing on calls
- 3. Send it before a discovery call to pre-frame value
- 4. Use it internally to stop reinventing your offer every time

Read it once start-to-finish, then revisit each section as you clean up how you package, price, and present your CFO services.

1 Step 1: Stop Selling “Capacity”

If your offer still sounds like:

- 1. “X hours per month”
- 2. “Ongoing finance support”
- 3. “Available as needed”

You’re positioning yourself as replaceable. High-retainer CFOs sell **outcomes**, not availability. This menu is designed to anchor value around **decision-making, clarity, and control**.

2 Step 2: Anchor Your Pricing Around 3 Clear Tiers

You don’t need endless customization. You need structure. Use these tiers as your baseline.

Tier 1: Strategic CFO Foundation (\$3K/month)
For founders who need clarity, not chaos.
Includes:

- 1. Monthly financial review and insights
- 2. Cash flow visibility and risk flags
- 3. CEO-facing summary with action items
- 4. Asynchronous support (no fire drills)

Primary value: Confidence and direction.

Tier 2: Growth CFO Partner (\$5K/month)
For founders actively scaling and making real decisions.
Includes everything in Tier 1, plus:

- 1. Rolling cash flow forecast
- 2. KPI tracking tied to growth goals
- 3. Margin and cost structure analysis
- 4. Strategic input on hiring, spend, and priorities

Primary value: Faster, better decisions.

Tier 3: Embedded Fractional CFO (\$8K–\$10K/month)
For founders who want a true finance leader.
Includes everything above, plus:

- 1. Scenario planning and forecasting
- 2. Board or investor reporting support
- 3. Leadership-level strategy calls
- 4. Proactive financial planning tied to growth initiatives

Primary value: Stability and leadership without a full-time hire.

3 Step 3: Define What Is Not Included

This is where scope creep dies. Clearly state exclusions like:

- 1. Day-to-day bookkeeping
- 2. Tax preparation
- 3. Ad hoc “can you just check this” requests
- 4. Emergency work outside agreed cadence

When expectations are clear, respect follows.

4 Step 4: Use Add-Ons to Increase LTV (Not Complexity)

Instead of bending your core offer, layer add-ons: Examples:

- 1. Forecast rebuild or overhaul
- 2. Pricing or margin analysis project
- 3. M&A or fundraising prep
- 4. Systems cleanup or financial reset

This keeps your retainer clean while increasing upside.

5 Step 5: Present This Before the Call

Send this menu **before** your discovery or strategy call. When a founder sees:

- 1. Clear tiers
- 2. Clear pricing ranges
- 3. Clear outcomes

The conversation shifts from: “Why do you cost this much?” to “Which option makes sense for us?”

6 Step 6: Use This as Your Default

This is not a suggestion. It’s your new baseline. You can always say no. You can always walk away. But you should never be improvising your offer again.

Why this is important

Most fractional CFOs aren’t underpaid because they lack skill. They’re underpaid because:

- 1. Their offer is vague
- 2. Their pricing feels negotiable
- 3. Their value isn’t clearly framed

This offer menu fixes that. It turns your expertise into something visible, defensible, and repeatable — which is exactly what premium clients expect.

If you want this offer menu turned into a complete client acquisition system — including:

- 1. A pre-call authority asset
- 2. A landing page that positions you correctly
- 3. A follow-up system that books qualified calls
- 4. And pricing that attracts the right founders

Then let’s build it properly.

Book a Free Strategy Session

We’ll map out how to implement this without trial-and-error and without you becoming a marketer.

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