

AI-ENABLED ADVISORY PRACTICE

AI-Powered Corporate Finance Leadership, Without the Full-Time Overhead

Touchstone | Corporate Finance (“TCF”) pairs decades of Fortune 500 and Wall Street experience with an AI-driven analytics practice — the same caliber of insight the Fortune 500 uses, sized and priced for a business your size. AI isn't a bolt-on service line here; it runs underneath the work in every practice area.

CFO & Corporate Finance

Fractional CFO leadership, FP&A, cash-flow management & AI-powered performance management

Tax & Compliance

Entity structuring, cost segregation, equity compensation tax & retirement plan fiduciary advisory

Value Creation & M&A

Buy-side & sell-side advisory, valuation, roll-up strategy & exit planning

Financing & Restructuring

Capital market advisory, liquidity solutions, turnaround & crisis management

OUR SERVICES

CFO & Corporate Finance

- Fractional CFO
- FP&A & forecasting
- Cash-flow management [AI]
- AI-powered performance management [AI]

M&A & Transaction Advisory

- Buy-side & sell-side advisory
- Due diligence [AI]
- Valuation [AI]
- Roll-up strategy

Financing & Liquidity Solutions

- Debt & equity capital market advisory
- Credit facility structuring
- Liquidity management [AI]
- Lender & investor relations

Restructuring & Turnaround

- Cash-flow stabilization
- Debt restructuring
- Capital structure optimization
- 13-week cash flow modeling [AI]

Tax Strategy & Planning

- Entity structuring
- Cost segregation studies
- QSBS & equity comp tax planning
- 409A valuations [AI]

Bookkeeping & Financial Operations

- Bookkeeping
- Outsourced controller services
- AI-assisted month-end close [AI]
- Management reporting [AI]

Business Owner Advisory

- Growth & succession strategy
- Exit readiness & business valuation [AI]
- Board & governance advisory
- Estate & wealth transfer strategy

WHERE AI DOES THE HEAVY LIFTING

AI Built Into the Work, Not Bolted On

Every practice area above runs on the same AI-driven analytics stack — catching what a spreadsheet-driven process would miss.

Predictive Cash-Flow Forecasting

Models trained on your own historical cash cycles flag a shortfall weeks before it would show up on a spreadsheet.

Real-Time Dashboards & Anomaly Detection

Continuous monitoring surfaces unusual transactions and variances the moment they occur, not at month-end.

AI-Powered Monte Carlo Simulations

Thousands of scenario runs turn a single-point IRR or valuation into a probability range, not a guess.

Document Intelligence for Diligence

AI-assisted review of contracts and data rooms speeds up M&A and lending diligence without cutting rigor.

Automated Close & Reconciliation

Machine-matched transactions cut manual reconciliation time and catch errors a monthly close would miss.

AI-Benchmarked Valuation & Comps

Real-time market comp analysis keeps valuation work current instead of relying on last quarter's multiples.

WHY TOUCHSTONE | CORPORATE FINANCE

A Distinctive Blend of Financial Acumen, Governance Expertise & AI-Driven Insight

We bring together former Big Five executives, CFOs, investment bankers, and wealth advisors — each averaging 20+ years of domain expertise — who have served as trusted partners to boards and business owners across the middle market.

400+ Years

Combined team experience across corporate finance

150+ Clients

Middle-market companies served

\$200M+ Value Identified

In savings and value created for clients

AI-Enabled Every Engagement

Backed by AI-driven analytics, not bolted on

HOW WE ENGAGE

01 On-Demand

Support exactly when you need it — nothing standing by when you don't.

02 Fractional

Part-time, senior-level finance leadership at a fraction of full-time cost.

03 Interim

A steady hand in the seat while you search for a permanent successor.

04 Project-Based

Focused expertise to underwrite a specific capex decision or initiative.

05 Virtual

An outside expert opinion on strategy, without adding headcount.

WHAT SETS US APART

Fractional, Not Full-Time

Senior CFO leadership without carrying a full-time executive salary.

Senior-Only Delivery

Partners engaged throughout an engagement — not just at kickoff.

AI-Powered Analytics

AI runs underneath every practice area — not bolted on as a separate service.

Deep Domain Expertise

400+ years of combined team experience across corporate finance.

Global & Cross-Discipline

CFO, tax, M&A, and restructuring advisory under one roof.

Rapid Deployment

Fractional and project-based models — mobilize in days, not months.

Ready to Build a Stronger Finance Function?

Contact us for a complimentary discovery session with a senior partner.

T: (310) 800-1410 | E: info@touchstonenext.com