



CFO MANAGEMENT SERVICES

Hands-on and effective financial management to help provide leadership stability



At GreenKite, we empower business leaders with comprehensive financial management and advisory solutions. Our services provide clear direction and valuable insights into financial planning, performance, and control.

We offer a broad range of financial management services designed to ensure that Boards and leadership teams have robust planning, reporting, and governance mechanisms in place. This helps businesses scale and grow effectively, with a clear understanding of financial performance drivers.

Our team of seasoned professionals bring a wealth of experience in formulating, scaling, and exiting businesses. We understand the challenges leadership teams face and recognise the critical role that high-quality management information and a strong, lean finance function play in achieving business objectives.

HOW WE SUPPORT YOU

- **Expertise:** Access to in-depth knowledge and market know how
- **Tailored Solutions:** Our services are customised to fit your business needs, providing the support you need when you need it
- **Fit for purpose:** Pragmatic and proportionate solutions which meet your requirements
- **Cost-effective:** An economical alternative to an in-house team
- **Board Assurance:** Provides confidence in governance allowing the board to focus on strategic decision-making
- **Operational Efficiency:** Streamlines processes, reduces risks, and improves decision-making for better resource management

OUR OFFERING

Whether you are an Insurer, MGA or Broker, the quality of information requirements and expectations from finance teams differs at each stage of your business life-cycle.

CFO fractional support

We can provide adhoc/temporary CFO and operational support to supplement your leadership team, overseeing and managing operational financial processes.

Accounting design

We can provide both a design structure covering key accounting & finance processes alongside working with you to configure financial systems.

Financial planning and analysis

We can develop intuitive and user-friendly financial models, with variable inputs, including scenario planning to understand key financial assumptions.

Financial control framework

We can review your existing financial controls and recommend controls proportionate to the needs of your business.

Strategic planning

We can support you in developing a comprehensive yet clear business strategy for a variety of purposes whether it be for prospective investors, Board review or as part of regulatory applications.

Target operating model

Using GreenKite's framework, we can develop the end-to-end target operating model covering all key business functions, including span of control, business considerations and roles and responsibilities.

Cost optimisation

We can provide a review of your cost base structure, recommending and helping to implement leaner operating processes to lower your cost burden.

Corporate governance

We are experts in undertaking reviews of Board effectiveness, composition and supporting with developing insightful, relevant and succinct Board reports.

ORSA (Insurer) development

We can support in both formulating and writing your business ORSA, to support both regulatory and Board planning requirements.



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WHY CHOOSE GREENKITE?

We are of the market, for the market – our multidisciplinary team of insurance experts offer the benefit of their extensive experience in all aspects of delegated authority, compliance and assurance.

Access deep and broad technical expertise, directed by informed strategic advice and delivered with current market best practice in mind. In addition to an extensive library of templates and reports, we can provide a tailored blend of seasoned expertise through an engagement model designed for your specific needs.

Our commitment to truly collaborative consultancy and dedication to excellent client service provides clients with a long term, trusted partner on whom they can rely, to help grow their business and avoid potential pitfalls.

OUR APPROACH

Accountability matters - we believe in the importance of having a single, senior, dedicated point of contact for every client who is responsible for the overall success of the engagement. Throughout each client relationship, we continually review and reassess resources to ensure we are deploying the appropriate multidisciplinary team that will deliver real value for every client.

Unlike competitors, we do not flood projects with junior technicians, overseen by managers who are often one step removed. We work closely with each client to understand their unique requirements, then strategically apply appropriate technical expertise in the appropriate areas.

This approach delivers actionable, cost-effective solutions to our clients and material improvements to their bottom line.

WE ARE GREENKITE

GreenKite is an award-winning, B Corp-certified, independent professional services consultancy, operating in the UK insurance market. We deliver practical, sustainable solutions that efficiently support internal change while ensuring future resilience and regulatory compliance.

Our flexible solutions are built around three core pillars and underpinned by our team's extensive market expertise and commitment to meaningful collaboration to ensure the best possible client outcome.



HOW CAN WE COLLABORATE?

Talk to us about how we can address your challenges.

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