



Transitional & Transaction Services

Guiding Financial Strategy. Fueling Business Growth.

Navigating Your Business Through Strategic Financial Transitions

At Masthead Financial & Capital Advisors, we guide lower and middle market businesses through pivotal financial transitions with clarity and confidence. Our services—ranging from Fractional CFO & COO support to Transaction Services, Fractional Banker roles, Strategic Planning, and Accounting—are built to address your company’s unique challenges and growth ambitions. By turning financial data into actionable KPIs, we equip leadership with the insight needed to optimize cash flow, strengthen capital structure, and maintain stability. This foundation empowers companies to execute mergers and acquisitions, drive strategic initiatives, and pursue sustainable long-term growth.

Our Array of Services

Fractional CFO

Develop financial comprehension beyond your general ledger.

- Strategic financial leadership on demand
- Actionable insights to drive growth
- Flexible, scalable CFO engagement

Fractional COO

Implementing strategies that impact daily operations to meet objectives.

- Enhances team alignment
- Streamlines workflows and stakeholder management
- Experienced decision-making support

Transaction Services

Navigating the transactions that support you and your business initiatives.

- M&A Services - Buy & Sell Side
- Transition Representation & Execution
- Strategic Projects & Growth Strategy

Fractional Banker

Offering critical resources to make sure your business succeeds.

- Capitalization Optimization
- Capital Markets - Source Funding
- Cash Flow Management

Strategic Planning

Knowing where your business is now and optimizing it for the future.

- Customized Strategies for Growth & Transition
- Positioning for Long Term Value Creation
- Risk Assessment & Optimization

Accounting Services

Accurate, strategic accounting support to enable informed decision-making.

- Monthly reconciliations ensure spotless records
- GAAP-ready statements and compliance
- Cash-flow forecasts and budgeting

Contact Us

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