

**Atlantic Canada Launch Export Program Mission
to Ottawa and Toronto November 2025**



DELEGATE CORPORATE PROFILE

Company information	Company name: THE CFO ADVISORY SERVICES
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Delegates Attending	Uchenna Emmanuel Okeke, Director, THE CFO ADVISORY SERVICES
Company Logo (insert or attach)	Available on file.
Company Description	The CFO Advisory Services is a premier provider of outsourced CFO solutions, dedicated to helping small and medium-sized enterprises (SMEs) achieve financial stability and strategic growth. We offer expert financial leadership without the cost and commitment of a full-time CFO, enabling businesses to optimize cash flow, enhance profitability, and maintain regulatory compliance.
Product and/or Service Information . Unique benefit you seek to promote for your service or product (USP).	<p>Our core services include:</p> <ul style="list-style-type: none"> ○ Business Growth Strategy & Advisory Revenue growth planning; new market, product, service, and industry expansion; mergers & acquisitions; growth pathways; operational and financial planning; and talent & leadership development. ○ Financial Performance Management Strategic planning and goal setting; budgeting & forecasting; cash flow management; financial analysis & reporting; performance measurement and KPIs; cost and risk management; capital and resource allocation; technology and data integration; and continuous improvement and governance. ○ Capital Advisory & Funding Connections Funding and investment readiness services, plus matchmaking for loans, grants, and equity financing with active linkages to regional, national, and international investors and financial institutions.

	<ul style="list-style-type: none"> ○ Training & Community CFOAS Academy and “The CFO Community” workshops, building SME financial management capacity and supporting knowledge sharing across Atlantic Canada <p>Why Choose Us?</p> <p>Our unique and innovative selling features are:</p> <p>1. Flexible Engagement & Marketplace Model</p> <ul style="list-style-type: none"> ○ Fractional CFO Marketplace: A flexible, on-demand model that allows SMEs to access senior-level financial leadership without the cost of a full-time CFO. ○ Flexible Engagement Models: Businesses can engage solo experts or entire financial teams for short-term, part-time, or ongoing projects. ○ Smart Matching Technology: Clients are matched with advisors who best align with their goals, industry, and financial needs. <p>2. Capital Access & Investor Connections</p> <ul style="list-style-type: none"> ○ Capital & Funding Advisory: CFOAS helps clients build investor-ready financials and connect directly to lenders, grant programs, and private investors. ○ Funding & Investor Linkages: Direct connections to lenders, grant programs, and investors, bridging the capital access gap for Atlantic SMEs. <p>3. Technology, Insights & Compliance</p> <ul style="list-style-type: none"> ○ Real-Time Collaboration: A secure, SharePoint-powered digital workspace enables efficient communication and document sharing. ○ Insights-Driven Decisions: Dashboard and analytics tools help clients track KPIs and make smarter, data-backed business decisions. ○ Standardized Playbooks & Tools: Proprietary templates, dashboards, and workflows accelerate delivery and improve decision-making. ○ Data Security & Compliance: Tiered pricing models, legal protections, and no client data downloads ensure compliance and safeguard sensitive information. <p>4. Global & Regional Expertise</p> <ul style="list-style-type: none"> ○ Global Talent Pool: Access to vetted finance professionals across North America, Europe, Africa, and Asia (including the Middle East), bringing international expertise and visibility to Atlantic Canadian SMEs. ○ Regional & Cross-Border Expertise: Unique ability to serve both Atlantic Canada markets and international trade/finance corridors (Canada–Nigeria, Canada–Europe, Canada–Dubai, UAE/GCC, Canada–US).
Exporting	<p>Global & Regional Expertise</p> <ul style="list-style-type: none"> ○ Global Talent Pool: Access to vetted finance professionals across North America, Europe, Africa, and Asia (including the Middle East), bringing international expertise and visibility to Atlantic Canadian SMEs. <p>Regional & Cross-Border Expertise: Unique ability to serve both Atlantic Canada markets and international trade/finance corridors (Canada–Nigeria, Canada–Europe, Canada–Dubai, UAE/GCC, Canada–US).</p>

Sales Pitch:	<p>The CFO Advisory Services delivers high-impact, outsourced CFO expertise; empowering SMEs with strategic financial leadership, cost optimization, and data-driven growth, without the commitment to a full-time CFO.</p> <p>They specialize in business growth strategy, financial performance management, and funding readiness. As well as auditing and financial management</p> <p>Financial clarity isn't a luxury; it's a necessity. Partner with us and transform uncertainty into a strategic advantage.</p> <ul style="list-style-type: none"> ◇ Reduce costs, increase profitability, and enhance financial efficiency. ◇ Access industry-leading CFO expertise tailored to your business needs. ◇ Make data-driven decisions with confidence and precision. ◇ Unlock strategic insights that fuel sustainable growth.
Businesses of Diversity	
Sectors or Industries	<ul style="list-style-type: none"> • Technology and Artificial Intelligence • Healthcare and Telemedicine • Manufacturing • Construction • Logistics/Transportation • Not-for-Profit.

Needs Assessment:

Currently Exporting	
Tell us a bit more about your expectations, interests, and goals for the mission	<p>Expectations:</p> <ul style="list-style-type: none"> • Market Expansion: Gain insights into the financial needs of SMEs in Ontario and the USA and establish connections for potential business expansion. Link with cross-border agencies that need that presence from Canada or service partnerships from Canada to be able to continue with their business. • Networking & Partnerships: Engage with industry leaders, business owners, investors, and financial institutions to explore collaboration opportunities. • Industry Insights: Understand Ontario's and the USA's business ecosystem, particularly in high-growth sectors like fintech, technology and artificial intelligence, healthcare, manufacturing, construction, Logistics/transportation, and not-for-profits. <p>Interests:</p> <ul style="list-style-type: none"> • Building Strategic Relationships: Connect with SMEs, venture capitalists, and investors who require outsourced CFO expertise. • Exploring Regulatory & Business Climate: Learn about the USA's financial regulations, tax incentives, and business structures that impact financial outsourcing services.

	<ul style="list-style-type: none"> Engaging with Potential Clients: Meet businesses looking for scalable financial leadership solutions, positioning The CFO Advisory Services as a trusted partner. <p>Goals:</p> <ul style="list-style-type: none"> Market Entry Strategy: Identify key industries and companies in need of outsourced CFO services in the USA. Lead Generation & Client Acquisition: Secure potential leads and initiate discussions with SMEs requiring financial management expertise. Brand Visibility & Thought Leadership: Position The CFO Advisory Services as a leading provider of outsourced CFO solutions in North America. Long-Term Business Development: Establish a foundation for ongoing business opportunities, partnerships, and referrals within the USA's SME ecosystem.
Does your company have ready-for-mission marketing assets, either digital or handouts? Please select all that apply (email with the approved DELEGATE CORPORATE PROFILE):	<ul style="list-style-type: none"> Brochures Company Profile Logos/photos/etc. Website
Social Media and IT information	The branding, website, and social media platform are a work in progress and should be ready shortly.
List your most important end-users or end-user industries.	Technology and Artificial Intelligence Manufacturing Construction Healthcare and Telemedicine Logistics/Transportation Not for profit.
Job title(s) of person in the prospect organization you typically meet with.	Chief Executive Officers Managing Directors Chief Financial Officers Senior-level decision-makers.
How is your product typically distributed and marketed (and in other	Through our website, business referrals, partnership, trade agencies, chamber of commerce, satisfied customers, etc

countries if applicable)?	
Describe the type of business partner you are looking for (ideal profile) Nature of relationship sought?	<ul style="list-style-type: none"> • Venture capitalist • Equity and funding providers. • Export Credit Agencies (ECA) • Export Canada and Export Agencies • Strategic business referral partners. • Clients.
Seeking representation in-market?	Yes
Export markets within Canada	In discussions with companies in Ontario and Nova Scotia.
Are you currently doing business in the USA? Where, how, with whom.	No
Particular businesses of interest are:	<ul style="list-style-type: none"> • Credit Unions • Venture capitalists/NGOs/Any business within the following industries: • Technology and Artificial intelligence • Healthcare and Telemedicine • Manufacturing and Advanced Industries • Construction • Logistics/Transportation • Export Development Canada • Export credit agency (Ontario) • Chamber of Commerce – Ontario and Canada • Canadian Manufacturers and Exporters Association • Audit companies as a referral partner • NGOs, particularly those in affordable housing planning to help them secure funding from entities like CMHC and banks
Consulates/Embassies/ Trade Offices of interest are:	USA, European Countries, UAE, GCC Countries, and Nigeria.
Particular that we DO NOT want to meet at are:	n/a

Business Organization Membership	Chamber of Commerce
Intake Meeting Notes	