

GUIDE to Outsourcing Accounting

 NexTier Solutions

Outsourcing Accounting and CFO services provides firms with a financial management foundation to meet the needs of your growth-oriented business.

Giving you back time to grow your business.

The Issue

*82% of medium to small businesses fail because of poor accounting and cash flow management.**

Let's solve for that.

 NexTier Solutions

NexTier Solutions provides consulting services that are catered specifically to our client's needs. Our unique collaborative approach provides employers with turnkey business solutions with accounting, compliance, and human resource management services together in one place. s

*Insights West Survey of Business Owners, 2018.

At NexTier, we provide personalized and professional guidance on the following accounting and fund operations:

Financial services for Advisors / Broker-Dealer

- › Private equity and debt financing
- › Investor and board of directors meeting preparation

Reporting and cash management

- › Dashboard reporting of key metric benchmarking and trend analysis
- › Cash flow projections, budgeting, and forecasting
- › Treasury management
- › Expense analysis and vendor management

Fund Operations

- › Oversight of third-party administrator, including custody and fund accounting
- › Fund formation and operational set up
- › Treasurer services to funds
- › Review and approval of net asset values (NAV)

Audit Support

- › Management of overall audit engagement for your Funds
- › Communication and planning with the audit firm
- › Preparation of financial statements and related disclosures
- › Preparation of audit schedules, memos, and checklists

Accounting & HR: Experienced professionals, proven results



Lance Baker CPA, CFA, Principal and Chief Executive Officer

Lance specializes in providing companies strategic solutions to optimize business growth and profitability. Lance has over twenty years of experience in Finance, serving as CFO for multiple companies, and leading them successfully through acquisitions. Prior to founding NexTier, Lance was the CFO and a managing partner at Hatteras Funds. Lance earned his Bachelor of Science and Masters in Accounting from the University of North Carolina. He is a licensed Accounting professional and holds the Chartered Financial Analyst® designation.

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Candi Hughes, CPA, CAIA, CFP®, Principal and Chief Operations Officer

Candi specializes in blending accounting and operations to help provide meaningful reporting and optimize business efficiency. Candi has over twenty years of experience in Accounting and Financial Operations, serving as Controller and Director of Operations for multiple companies. Prior to founding NexTier, Candi was the Controller and a partner at Hatteras Funds. Candi earned her Bachelor of Science in Business Administration from the University of North Carolina and Masters in Accounting from Syracuse University. She is a licensed Accounting professional and holds the Chartered Alternative Investment Analyst and Certified Financial Planner™ designations.

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Christine Gevertz PHR, SHRM-CP, Human Resources Director

Chris provides Human Resource Management administration for C-Suite Executives and Management as well as HR support for all levels of an organization at both a strategic and tactical level. Chris has over 20 years of experience in HR leadership in both for-profit and non-profit organizations, serving most recently as a member of the Executive Management Team at Clean Design, Inc. as Director of People and as Director of HR at Hatteras Funds. She holds her Professional in Human Resources (PHR) certification from the Human Resource Certification Institute (HRCI) and her Society of Human Resource Management Certified Professional (SHRM-CP) certification.

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Melissa Harr, Assistant Controller

Melissa has a passion for helping businesses thrive through following best accounting practices and strategic financial modeling. In her role at NexTier she supports the corporate controller in all accounting-related activities, including managerial accounting, financial reporting, and finance activities. Prior to joining NexTier, Melissa had almost 20 years of customer service experience before returning to accounting. She earned her Bachelor of Science in business and law at Western Carolina University, and graduated magna cum laude.

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Christy Lassiter, Assistant Controller

Christy has worked closely with CPA's and internal audit teams for over 20 years. She has helped streamline accounting processes within A/P, A/R, payroll, fixed assets, and cash management. Her accounting experience includes retail, manufacturing, computer brokerage, construction, and investment management. Christy is proficient with QuickBooks Desktop, QuickBooks Online, Bill.com, Expensify, Microsoft Office, and Google Suite / Workspace.

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