



# The finance back office for owner-operated businesses.

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BOOKKEEPING · TAX · FRACTIONAL CFO · DATA & AI

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[parikh.financial](https://parikh.financial)

Founder-led by Ravi Parikh, CFO

United States · fully remote

— WHAT WE DO

# One team for the whole money side — and the systems behind it.

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## Bookkeeping

Accurate, current books every month — reconciliations, clean categorization, and financials you can run the business on.

## Tax

Preparation, planning, and filing handled year-round, so you capture every deduction and never scramble at a deadline.

## Fractional CFO

Forecasting, cash-flow, and strategic guidance from a senior team — CFO insight without a full-time hire.

## Data & AI

Data pipelines, live dashboards, AI-driven workflows, and AI transformation for finance teams.

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— THE BACK OFFICE

# What the day-to-day work looks like.

**BOOKKEEPING**

Clean books, on time

Monthly close, bank and platform reconciliations, expense categorization, accounts payable & receivable, and financials delivered on a schedule you can count on.

**TAX**

Proactive, not reactive

Business and owner tax prep, quarterly estimates, sales- and occupancy-tax filings, and entity and deduction planning — coordinated with your books.

**FRACTIONAL CFO**

Numbers that drive decisions

Cash-flow forecasting, margin and pricing analysis, budgeting, and board- or lender-ready reporting, exactly when the business needs it.

# We don't just run finance — we modernize it.

Modern finance is a data problem. We bring engineering and AI to it — whether we run your books, or help your existing finance team transform how they work.

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## AI-driven workflows

Automate categorization, reconciliation, AP/AR, and reporting with AI agents — every output reviewed and owned by a real person.

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## Data engineering & BI

Unify QuickBooks, banks, POS, and booking platforms into one source of truth, with live dashboards built around your metrics.

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## AI transformation for finance teams

We assess where AI fits, design the workflows and agents, choose the stack, and roll it out — with controls and accuracy intact.

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## Custom builds

When off-the-shelf software falls short, we build the internal tools and integrations your finance operation actually needs.

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## — WHO WE SERVE

# Owner-operated businesses across industries.

We work with companies of nearly every kind — with particular depth in high-growth tech and real estate, and anywhere the numbers get complex.

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SaaS & Startups

Cap tables · MRR

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Hotels & Hospitality

RevPAR · ADR

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Crypto & Web3

Digital-asset accounting

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Campgrounds & RV Parks

Seasonal cash flow

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Private Equity Funds

Fund & LP reporting

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E-commerce

Inventory · margins

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Real Estate & Multifamily

Per-property economics

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Professional Services

Project & retainer billing

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Short-Term Rentals

Occupancy tax · P&L

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Self-Storage & Marinas

Unit economics

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— WHY PARIKH FINANCIAL

# Senior finance, sized to your business.

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**Senior team, fractional cost**

Experienced bookkeepers, tax professionals, and CFO-level guidance — without the overhead of an in-house finance department.

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**Real depth, fast**

We already understand the things that trip teams up — cap tables, multi-entity structures, occupancy tax, seasonal swings — so onboarding is faster and the advice is specific.

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**Engineering and AI, built in**

We treat finance as a data discipline — pipelines, dashboards, and AI workflows that make your numbers faster, cleaner, and decision-ready.

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**Fully remote, fully responsive**

Cloud-based and built to move fast. We plug into your stack, and location never slows us down.

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— BY THE NUMBERS

Trusted with the  
financials that matter.

\$100M+

in revenue under expert management

50

states served, fully remote

10+

specialized industries

One

team, from your books to AI  
transformation

— HOW IT WORKS

# Getting started is three steps.

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FIRST

## Onboard

We connect to your QuickBooks, bank accounts, and booking or payment platforms, and clean up wherever the books stand today.

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THEN

## Run

Monthly close, reconciliations, sales- and occupancy-tax filings, and tax prep — delivered on time, every period.

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ONGOING

## Steer

Forecasts, dashboards, and CFO-level guidance whenever a real decision is on the table.

— THE BOTTOM LINE

You shouldn't have to  
choose between running  
your business and  
understanding its finances.

We take the entire money side off your plate — books, taxes, the strategic calls, and the systems behind them — so you can focus on the business itself.

— LET'S TALK

# Ready to modernize your finances?

Book a free consultation and we'll map out exactly what we'd take off your plate — and where AI can move you faster.

[Book a free consultation](#)