



WISE FINANCIAL CONSULTING

WHO IS WFC?

Wise Financial Consulting is a specialized financial consulting firm providing interim and fractional accounting, finance, and M&A advisory services. We work across multiple industries with deep specialization in electronic security and fire & life safety.

With over 250 companies served in 11+ years, Wise brings experienced, operator-level financial leadership to businesses navigating growth, complexity, and transactions.

Founded in 2014 by Ken Wiesenfeld, former CFO of two electronic security companies, Wise was built to solve the real-world financial challenges owners and leadership teams face.

HOW WE HELP

Core Services

Accounting & Operational Support

Cleanup and reconciliation, process improvement, financial reporting, and team support tailored to your operations.

Financial Planning & Analysis (FP&A)

Dashboards, forecasting, and budgeting that turn data into clear, actionable insight.

Sell-Side Advisory

Financial readiness, diligence support, and guidance through the full sale process.

Buy-Side Diligence & Integration

Hands-on financial diligence, integration planning, and post-close execution.

Business Advisory Services

Positioning your business for sale, marketing materials, and access to qualified buyers.

WHEN CLIENTS ENGAGE US

CEOs & Owners

- Need experienced financial leadership without a full-time hire
- Preparing for growth or acquisitions
- Want confidence in the numbers driving decisions

CFOs & Controllers

- Overwhelmed teams or temporary resource gaps
- Budgeting, forecasting, or cleanup needs
- System implementations or optimization

Private Owners & Private Equity Firms

- Portfolio acquisitions and integration support
- Pre-sale preparation and Quality of Earnings readiness

WHY WISE

- 75+ years of combined accounting experience
- Deep industry knowledge in Fire & Security
- Flexible, fractional, and long term engagement model
- We know your accounting software

Contact Information

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Scope of Services Summary

Operational Accounting

- Monthly Close
- GL/Trial Balance Ownership
- Billing and Collections
- Procure to Pay
- Job Costing
- Payroll
- Cash Management
- Internal Controls
- Accounting System Transitions
- SOP Development
- Internal Staff training and Transition

Financial Planning & Analysis (FP&A)

- Financial Reporting
- Key Metric Reporting
- Bank Reporting
- Budgeting
- Cash Forecasting
- Long Term Financial Modeling
- Ad Hoc Analysis
- Business Valuation Analysis
- Growth Initiative Planning
- Cost Containment Analysis

Sell Side Advisory

- Preparation and Readiness Implementation
- Data Room Build Out
- Marketing to an Offer
- Project Management of Diligence to Close
- Post Close Support

Buy Side Diligence & Integration

- Diligence Coordination and Project Management
- Integration Coordination and Project Management
- Buy Side Software Support (Midaxo)
- Accounting Integration and Post Close Purchase Accounting