

Cost-effective fractional CFO services for your business

As your fractional Finance Director, FDPack's unique combination of software tools and commercial expertise gives you instant access to the insightful management information any business needs, all without the risk of an in-house equivalent and for a fraction of the cost.



Financial clarity for forward-looking businesses

02 Elevator Pitch



Financial clarity for forward-looking businesses

Many small business finance functions look backward – focused on what’s already happened. But past data alone won’t help you make the right decisions today.

That’s where FDPack comes in.

We deliver financial clarity to make good quality decisions now that positively influence future outcomes – without the cost of a full-time finance director or in-house team.

FDPack combines expert fractional FD support with our own proprietary forecasting software, delivering one joined-up, accurate view of where your business stands, where it’s heading, and what to do next. Whether you’re scaling, raising funds, or planning to exit, we help you make informed business decisions.

“FDPack gives business owners the clarity to make smart, forward-looking decisions – without the cost or complexity of a full-time finance team. One fixed fee with expert support and forecasting software that updates monthly and helps you plan ahead, stay in control, and save money long term.”
Spencer Smith, Founder



03 Who We Help



Designed for ambitious SMEs

FDPack supports:

- ✓ Founders and CEOs of growing businesses
- ✓ Businesses planning to raise investment or preparing for exit
- ✓ Investors and VCs seeking clarity across portfolio companies
- ✓ Business advisers and consultants who support scale-up clients



“

We're the only UK provider offering both fractional FD expertise and proprietary forecasting software in one clear, cost-effective solution for ambitious SMEs.

”

Spencer Smith, Founder

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04 Where We Fit In



We sit at the heart of your finance and accounting function

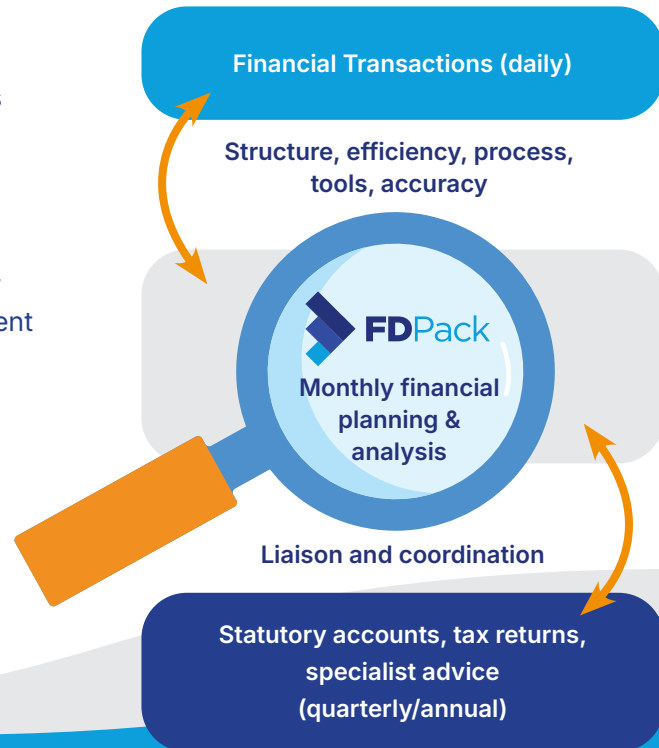
Many SMEs struggle to make sense of their numbers. Internal teams focus on recording daily transactions. External accountants/auditors focus on quarterly returns and year-end accounts.

What's missing is the insight in between:

Monthly insights from the analysis of historic and forecast financial statements and real-time clarity that helps business owners and senior management make informed decisions.

Core Deliverables:

Monthly up-to-date financial statements (P&L, Cash Flow & Balance Sheet) for actual, budget and forecast presented in a bespoke format with variance and trend analysis to highlight priority areas for decisions and actions.



05 Our Solution

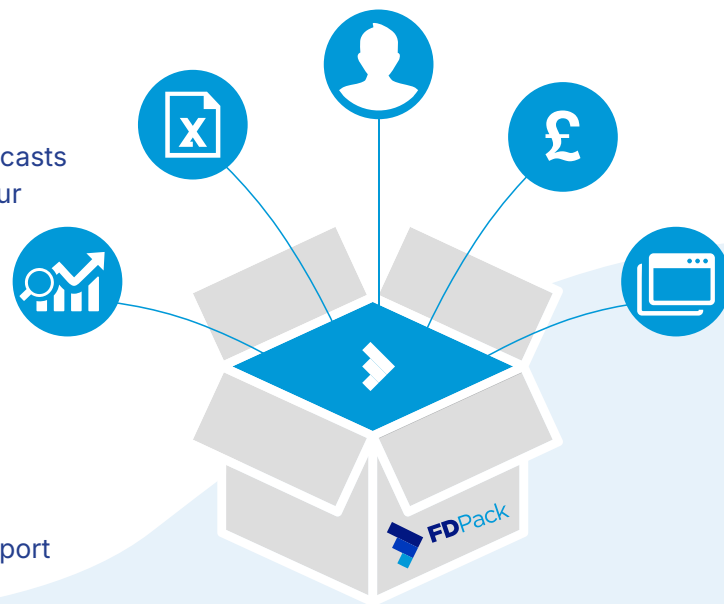


The complete package: we take care of your management accounting

Forecasting, financial insight, clarity and simplicity – all in one

FDPack brings together your actuals, budgets, and forecasts into one seamless, easy-to-use system supported by our seasoned FD expertise.

- ✓ 3-way forecasting (P&L, Cash Flow, Balance Sheet)
- ✓ Rolling updates with monthly actuals
- ✓ Forecasts with transaction-level detail
- ✓ Custom views for board, team, and investors
- ✓ Scenario planning and forward-looking decision support



Financial clarity for forward-looking businesses

06 Core Promise



Financial clarity. Forward-looking decisions. Fixed cost.

FDPack gives businesses the ability to see what's coming – through expert support and custom-built forecasting software. This means you can make confident decisions, grow efficiently, or prepare for a successful exit – all at a fixed cost, without building a full finance team. We will create a complete in-house finance resource for you.

“*We simplify. Then we give clarity. Then we help businesses take the right action now for the future outcomes they need and want.*”

Spencer Smith, Founder



Financial clarity for forward-looking businesses

07 Mission & Vision



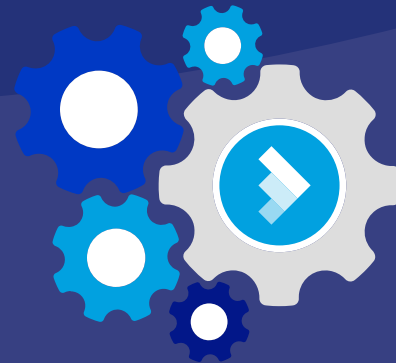
Mission:

To give ambitious business owners the financial clarity they need to make confident decisions about the future – whether they're planning to grow, raise investment, or prepare for a successful exit. We combine expert insight with powerful proprietary forecasting software to help you understand not just where you are – but where you're going and what to do next.

Vision:

We want every SME to have access to clear, forward-looking financial insight – the kind that helps them plan ahead, make better decisions, and stay in control. No jargon, no big teams. Just the right information at the right time – delivered simply, with the added benefit of saving time, money, and stress.

“*Thank you for helping us get our figures together. I can now sleep better at night.*”
William Moore, CEO of Airbox Systems



08 Key Differentiators



Why FDPack is different

- ✓ **Future-focused, not backward-looking** – enabling action today, not regret tomorrow.
- ✓ **Software + expert service** – a unique combination, fully managed, not DIY SaaS.
- ✓ **Fractional and embedded finance function** – all the clarity and capability of a finance director and team, but without the costs.
- ✓ **Rolling forecasts and real-time updates** – actuals, cash flow and forecasts give you a current, actionable view of financial performance – not a report that's out of date by the time it's printed.
- ✓ **Simplicity that adds clarity** – we remove the noise and make the numbers actually useful.
- ✓ **Fixed monthly cost, no surprises** – just one monthly fee that covers everything.
- ✓ **Custom views for every stakeholder** – one system tailored to multiple perspectives.
- ✓ **A Category of One** – no-one else offers this blend of forecasting-led financial strategy, proprietary software and fractional expertise.

Financial clarity for forward-looking businesses

09 Values & Brand Personality



Our Values:

- **Simplicity over complexity** – reduce, clarify, demystify
- **Accuracy to the penny** – good data drives good decisions
- **Objectivity** – unbiased, expert advice without the internal politics
- **Efficiency** – no excess, just results
- **Peace of mind** – our clients sleep better at night
- **Clarity** – turning complex financials into clear actionable insight

We Are:

- ✓ Clear, grounded, and insightful
- ✓ Experienced business owners as well as finance professionals
- ✓ Future-focused – always looking ahead to what's next
- ✓ Driven by logic, clarity, and action
- ✓ Confident, calm and trusted advisers
- ✓ Fractional and focused – giving you exactly what you need
- ✓ Human – we care about our clients and the weight they carry. We have lived experience of the problems you face
- ✓ Here to bring clarity and peace of mind

We're Not:

- ✗ Corporate or jargon-heavy
- ✗ Flashy consultants or generic SaaS providers
- ✗ Robotic, transactional, or removed from your goals
- ✗ Fulltime, full-cost finance bloat or status quo thinking
- ✗ Here to overwhelm or confuse
- ✗ Accountants

10 Our Story



FDPack was built out of necessity – not theory

“ I created FDPack 15 years ago as one of the UK’s first virtual FD services, with a clear purpose: to give business owners the financial clarity they need to make confident decisions – delivered simply, accurately, and efficiently. Inspired by the principle of Colin Chapman, founder of Lotus Cars, ‘Simplify, then add lightness,’ I built a service that focuses on what really matters. Many businesses struggle with complex, costly finance functions that aren’t delivering value. Our approach is to remove unnecessary steps, reduce cost, and bring forward-looking insight that helps you run your business better. ”

Spencer Smith, Founder

FDPack shifts the focus from hindsight to foresight.

“ Most business owners are stuck reacting to historic data. We give them a forward view – forecasts, trends and cash flow projections they can trust. Because when you understand where your business is heading, you can act today to influence tomorrow. ”

Spencer Smith, Founder



11 What Clients Say



Meet some of the people we've helped

It's not what we say that's important,
it's what our clients say that
matters most.



"FDPack helped us to reduce the amount we spent on the finance team, simplifying and consolidating our systems, preparing the company for a successful sale at retirement."

Amanda Howell, Managing Director, SURE24



"FDPack have helped us to reduce the cost of our admin staff, integrate our sales pipeline into a forecasting model, improved accuracy of monthly accounts and forecasts and given potential investors confidence about the integrity of the numbers."

Nigel Phillips, Finance Director, Govtech Solutions

"FDPack allows us to have a complete set of monthly financial reporting statements covering actual and forecast data without the cost of a finance team."

Gadi Sonnino, CEO, IDO



"Spencer has become an invaluable member of the team playing a critical role in implementing major changes to our tools and processes. The FDPack reporting tool is central to each board meeting, providing consolidation of our operating companies and the forward-focused views which are key to our decision making."

Chris Lewis, CEO of Chris Lewis Group



"I am happy to commend the services of FDPack to any business that is looking to improve the accuracy and presentation of their finances in preparation for sale."

Simon Bursell, Independent Corporate Finance Adviser to Peterkin (UK) Limited



"FDPack (Spencer and Simon) have given us the technical financial / accountancy expertise that an in-house finance director would give us and have enabled us to build a strategic plan, that is now being tracked each month, so that we can be confident about the growth decisions we are making to reach our financial goals. They are an integral part of our management team now and a pleasure to work with."

Ross Brain, Managing Director, Barratts Solicitors

12 Get in touch

See FDPack in action

Book your free discovery call

If you would like to talk about where you are now and where you'd like to go, then get in touch.

There's no pressure and no jargon — just friendly, expert advice based on real experience.

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