



CMX ADVISORS

Finance & Accounting | FP&A & Controlling | Continuous Improvement
Project Management | Agentic AI Services

Finance. Performance. Process. AI-Enabled Execution.

CMX & Associates partners with owners, CEOs, and leadership teams to strengthen finance, improve operational discipline, and modernize decision-making. We provide practical, execution-focused support across finance and accounting, FP&A and controlling, continuous improvement, project management, and agentic AI to improve visibility, control, and scalable performance.

CORE SERVICE OFFERINGS



FINANCE & ACCOUNTING SERVICES

- Month-end close and financial reporting
- Cash flow, working capital and liquidity support
- Internal controls and policy development
- Accounting process design and cleanup
- Audit readiness and compliance support
- KPI reporting and management visibility



FP&A & CONTROLLING SERVICES

- Budgeting, forecasting and scenario planning
- Variance analysis and performance reviews
- Margin, pricing and profitability analysis
- Standard costing and cost control support
- Dashboard development and decision support
- Board-ready reporting packages



CONTINUOUS IMPROVEMENT

- Process mapping and waste reduction
- KPI cadence and accountability routines
- Productivity, yield and labor optimization
- S&OP and cross-functional alignment
- Working capital improvement initiatives
- Operating rhythm and execution discipline



PROJECT MANAGEMENT

- PMO structure and project governance
- ERP, reporting and systems implementation
- Cross-functional initiative leadership
- Timeline, milestone and risk management
- Capital and transformation project support
- Post-implementation stabilization



AGENTIC AI SERVICES

- Automated reporting and KPI intelligence
- AI-enabled forecasting and scenario planning
- Power BI and SQL-driven analytics
- Workflow automation for finance and operations
- Real-time operational visibility dashboards
- AI copilots for insights and decision support

TYPICAL OUTCOMES



Faster Close
Improved month-end reporting speed



Cash Visibility
Better liquidity and working capital insight



Forecast Clarity
Sharper planning and decision support



Margin Insight
Better pricing and profitability visibility



Control Environment
Stronger controls and audit readiness



KPI Discipline
Clear dashboards and accountability routines



Project Execution
Structured delivery across key initiatives



Process Efficiency
Less waste and smoother workflows



AI Enablement
Smarter automation and faster insights

INDUSTRIES SERVED

Food & Beverage
Manufacturing

CPG

Retail

Distribution

Construction

Real Estate

Consumer Products

WHY CLIENTS ENGAGE CMX

- ✓ Integrates finance, accounting, operations, and technology
- ✓ Hands-on execution, not just advisory recommendations
- ✓ Brings board-ready rigor and practical operator thinking
- ✓ Flexible support for fractional, interim, and project-based needs
- ✓ Builds scalable systems, visibility, and control

Driving clarity, control, and scalable execution.

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