

M&A SUPPORT

[\$150M PE-Backed Platform]

CASE STUDY

ENGAGEMENT OVERVIEW

Following its acquisition by a private equity firm, our client engaged Alliance to strengthen its finance operations during a critical transitional period. They needed to streamline its 20-day month-end close, improve audit readiness, and ensure alignment between its ERP system, internal controls, and external reporting expectations. With a first-year PE audit approaching, the CFO sought a partner that could provide technical accounting expertise and operational support to build a more efficient and investor-ready finance function. Alliance served as a strategic resource to drive lasting improvements across financial reporting, process documentation, and compliance.

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The Alliance team is awesome to work with and helped me overhaul key reports ahead of my expectations. They also jumped on documenting processes and helped drive our close forward.

-Chief Financial Officer

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ALLIANCE SOLUTION

To support this critical transition, Alliance helped with:

01

Finance Process Optimization

Established a post-acquisition close calendar, supported ERP budgeting in Unanet, and helped reduce the close process.

02

Technical & Audit Support

Delivered ASC 606 evaluations, prepared business combination memos, and worked with auditors to streamline audit preparation.

03

Policy & Control Development

Created process narratives and identified key controls across 18+ accounting areas to meet internal control and audit standards.

04

Hands-on Advisory

Provided operational support to the CFO, facilitated balance sheet accuracy, and led audit to ensure data integrity and timeliness.

CLIENT OUTCOMES

- Achieved a faster and more efficient close process, supported by clear documentation, reliable reconciliations, and a structured reporting cadence.
- Completed their first-year audit as a PE-backed company, equipped with audit-ready financials and well-documented controls.

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