

Business Advisory Profile



Finance

People

Operations

We advise businesses, organizations and individuals on achieving discipline, rigor, agility, and growth at the various stages of their financial and operational journeys.

Through strategic planning, financial & investment stewardship, and operational effectiveness, we are here to empower success.



Who we serve

Our passion lies in providing support to clients operating in markets where the depth of resources and expertise may not match that of major cities, bridging the gaps in resources and expertise in every corner of the globe.



- Start-ups, Early-Stage Companies, Entrepreneurs, and Growth Businesses
- Family Offices, Private Foundations, and High Net Worth Individuals
- Small and Medium-Sized Private Equity Firms
- Non-Profit Organizations

Our promise

We listen deeply, and serve with respect and dedication, supporting you to achieve your goals, milestones, and mission.

At Waite Partners all clients are served through:

A total advisory partnership including collaboration and clarity to develop, align, measure, iterate, refine, and implement decisions to achieve your mission and short-, medium-, and long-term goals

Respect and dedication are guaranteed; everything else is calibrated to your rhythm.

[See our success stories](#)



Our areas of service:

Operations Advisory

We bring a level of expertise that typically mirrors the combined roles of the President, COO, CFO, and a team of consultants/advisors found in larger corporations.

Our aim is to help establish a well-balanced, risk-adjusted operations ecosystem that is perfectly tailored to the scale and specific needs of each company.

Ideal For

Start-ups, early-stage companies, entrepreneurs, and growth businesses

Established small and medium sized businesses

Business Equity Investment Advisory

When your business investments reach a level where you seek a trusted representative to oversee and enhance their value, we partner with you.

We provide management mentorship, act as your eyes and ears, and exceptional due diligence on existing or potential investments or exits.

We communicate with you in a concise, decision priority and action-oriented manner to ensure you make timely, informed decisions and optimize outcomes.

Ideal For

Small and medium sized private equity firms

Family offices, Private Foundations, and High net worth individuals

Non-profit organizations

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Strategic Board membership

This involves calibrating strategy, operations, finances, and governance to drive success and prosperity for the organizations we serve.

We serve as Board Member, Board Proxy, and as an Advisory Board member..

Ideal For

Small and medium sized private equity firms

Private foundations and non-profit organizations

Established small and medium sized businesses



Our expertise and scope of work

Finance



Capital & debt raises: establish a pathway for a disciplined, value creating, goal achieving capital raise, and to deliver post capital raise.

Financial statement assessment and planning: affirm, create, refine, and/or rebuild your financial statements and processes.

Financial Modeling: create and/or streamline pro formas, budget, dashboards, business plans, and executive reporting to deliver your impact story to stakeholders now and into the future.

Advisory on Implementation: collaborate with you to adopt, refine, calibrate, and achieve your finance plan and integrate it with your strategic goals and objectives. Improving the quality, transparency, and timeliness of the information and the decisions

Financial hunker down planning & implementation: we help clients design, refine, and achieve an operations ecosystem that can adjust in up and down cycles while preserving core values, expertise, and culture of your business.

People & Leadership



Culture assessment & planning: Positioning strengths and gaps relative to future goals and objectives

Culture plan implementation: Select, communicate and undertake the implementation journey

Leadership development and coaching

Key employee risk: assessing the risk profile of owners, leaders, managers, team members, and vendors. Collaborating to deliver an action plan, timeline, and implementation that supports uninterrupted business growth and mitigates operational disruption and risk.



Operations



Organizational effectiveness assessment: Evaluate your operations ecosystem for growth capacity, capability, and risks.

Optimal organizational operations pathway: Create high-level projections for organizational operations pathways options that connect to your organizational goals and objectives.

Support on implementation: Custom engagement to support you and your team along the journey

Strategic Planning



Create, modify, analyze, refresh the strategic plan for your business and/or any aspect of your life.

Collaborate with you to adopt, refine, calibrate, and achieve your strategic plan.



**Let's schedule your
free exploratory session.**



Our executive business expertise is your essential compass for navigating the intricate landscape of priorities and demands that challenge both you and your organization.

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