# ClearPath CFO Advisory Expands Bookkeeping Services to Support California?s Growing Business Communities

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Walnut Creek, CA ? ClearPath CFO Advisory, a financial services firm known for precision-driven accounting and advisory services, has announced the official expansion of its core Bookkeeping Service across multiple cities in California. This move aims to meet increasing demand from small and mid-sized businesses seeking consistent, GAAP-compliant financial management without the burden of internal staffing.

Founded by former entrepreneurs, ClearPath CFO Advisory was built to provide reliable financial clarity to businesses navigating growth, complexity, and compliance requirements. With over 22 years of operational and QuickBooks experience, the firm now serves California markets including Walnut Creek, Concord, Oakland, Berkeley, Fremont, Pittsburg, and Pleasanton.

"Bookkeeping is the foundation of every smart business decision, and our clients deserve services that are not just accurate, but useful," said Lawson James, Managing Partner, ClearPath CFO Advisory. "They?ve

structured their offerings so business owners can see their financial health in real time and make confident decisions without second-guessing the data."

The newly available bookkeeping services will support business owners across industries, including real estate, law, healthcare, consulting, and technology. With the California rollout, ClearPath CFO Advisory is bringing extensible solutions that include daily transaction processing, accounts payable and receivable management, financial report generation, and monthly reconciliations.

These services are part of tiered packages designed to match the operational needs and budgets of various business sizes. The firm?s base-level Premier package includes essential bookkeeping, reconciliation, and tax-ready financials, while the higher Elite and Exclusive packages add features such as payroll integration, direct deposit, financial reviews, and cash flow forecasting.

According to data gathered during client consultations in Contra Costa and Alameda counties, a recurring concern among business owners is the lack of timely, organized financial information that can inform strategic planning. ClearPath CFO Advisory addresses this by pairing clients with a dedicated account manager and leveraging advanced software platforms to maintain continuity and accuracy.

The onboarding process follows a structured seven-step engagement cycle, beginning with a discovery call and continuing through proposal, agreement, and account setup in QuickBooks. Once onboarded, clients receive ongoing communications and reporting based on the selected service level.

With the expansion into California, ClearPath CFO Advisory aims to close a persistent gap for businesses in need of quality financial support without hiring full-time staff. The firm?s services are especially suited for owners who are navigating back-office cleanup, scaling operations, or preparing for tax season and investor conversations.

?The challenges small business owners face are real: cash flow pressures, regulatory shifts, labor management. It?s not just about balancing books,? the Managing Partner, Lawson James, added. ?It?s about helping clients see the story behind the numbers and being ready to act on it. That?s the value they bring.?

In a state known for its business diversity and innovation, ClearPath CFO Advisory brings systems thinking and financial discipline that adapts to each client?s goals. By eliminating guesswork and replacing it with strategic insight, their bookkeeping services are positioned to serve as more than just a back-office function; they are a tool for forward planning and confident execution.

As part of its California rollout, ClearPath CFO Advisory is placing an emphasis on education and outreach.

Informational webinars and one-on-one consultations are being made available to businesses unfamiliar with outsourced bookkeeping models. The firm aims to demystify the process for first-time users by offering detailed walkthroughs, checklists, and ongoing client support that emphasizes transparency.

The company is also investing in technology to support its expansion. Clients will have access to cloud-based platforms with secure document sharing, real-time reporting dashboards, and customizable settings that reflect the specifics of their business. These tools allow for greater responsiveness and better communication between clients and their financial advisors.

The firm's local presence in the East Bay region is expected to be a key differentiator, as many bookkeeping services in the market operate remotely with little regional familiarity. ClearPath CFO Advisory believes that being physically close to the business communities it serves allows for more meaningful relationships and nuanced financial advice.

Businesses in California are increasingly seeking alternatives to in-house accounting teams due to rising employment costs, limited hiring pools, and the increasing complexity of regulatory compliance. ClearPath CFO Advisory?s model, which blends technology, expertise, and flexibility, is positioned to offer a sustainable solution for companies at various growth stages.

The firm also views this expansion as the foundation for deeper, long-term engagement across California?s economic landscape. By supporting local business ecosystems, ClearPath CFO Advisory aims to play a strategic role in regional development and financial resilience. These efforts reflect a broader commitment to empowering small businesses with the tools and support needed for sustained success in a dynamic marketplace.

The service expansion is now live and available to businesses operating in the listed California locations. Businesses interested in exploring a partnership with ClearPath CFO Advisory can request a consultation through the company?s official website or contact the Walnut Creek office for onboarding availability.
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**ClearPath CFO Advisory (California)**

*ClearPath CFO Advisory provides strategic accounting, bookkeeping, payroll, and CFO services for small to mid-sized businesses in Walnut Creek. With 22+ years of QuickBooks and financial expertise, they support growth-focused entrepreneurs.*

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