

ClearPath CFO Advisory Broadens Accounting Services to Serve California?s Small and Mid-Sized Business Sector

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WALNUT CREEK, CA - July 03, 2025 -
Walnut Creek, CA ? ClearPath CFO Advisory, a trusted financial services firm based in Walnut Creek, has officially expanded its Accounting Services to meet the evolving needs of small and mid-sized businesses across multiple California markets. The decision comes in response to growing demand for accurate, compliant, and extensible financial solutions amid ongoing regulatory changes and business growth pressures.

With more than 22 years of real-world experience in accounting, QuickBooks, and operational finance, ClearPath CFO Advisory was founded by former business owners who understand firsthand the challenges faced by entrepreneurs. The firm has long operated with a mission to make financial management accessible, structured, and actionable for business leaders navigating daily demands and long-term planning.

The accounting service expansion now includes full-service support for businesses in Walnut Creek,

Concord, Oakland, Berkeley, Fremont, Pittsburg, and Pleasanton. These services are designed to help owners and managers stay focused on operations while maintaining financial accuracy, tax compliance, and forward-looking visibility.

?Our accounting services were created to be more than data entry or simple recordkeeping,? said Lawson James, Managing Partner, ClearPath CFO Advisory. ?Clients come to them because they need a system that delivers clarity, supports compliance, and allows for smarter financial decisions at every stage of business.?

The expanded offerings include general ledger maintenance, monthly financial reporting, budget preparation, income and expense categorization, chart of accounts structuring, and support with GAAP-compliant financial statements. In addition, clients receive assistance with state and federal tax readiness, audit support, and historical financial cleanup when needed.

One of the key strengths of ClearPath CFO Advisory?s accounting program is its focus on creating clean, organized records that align with financial goals and compliance requirements. Businesses are onboarded through a detailed process that begins with a discovery consultation and continues through a service proposal, setup, and long-term engagement management. Each client is assigned a dedicated account lead who ensures continuity, accurate reporting, and prompt communication throughout the relationship.

The firm offers three accounting service levels designed to meet the operational scale of various business types. The Premier tier focuses on essential reporting and recordkeeping, while the Elite and Exclusive tiers include additional capabilities such as advanced analytics, financial review meetings, and integration with other advisory functions like payroll or forecasting.

The timing of the expansion aligns with increased reporting requirements and expectations for transparency in many sectors. Law firms, construction companies, e-commerce startups, and real estate agencies are among the primary industries served by the firm?s accounting division. These sectors often face evolving tax laws, grant reporting requirements, and multi-entity tracking needs, which ClearPath CFO Advisory addresses through a combination of technology and tailored financial systems.

In particular, the use of cloud-based accounting platforms allows ClearPath CFO Advisory to deliver real-time access to reports, secure file sharing, and dashboard visibility. Clients can review current financial data, track changes, and compare performance trends, all from one accessible and secure environment. This digital-first approach not only increases efficiency but also supports strategic planning and board-level reporting.

According to feedback gathered through client onboarding sessions and service reviews, businesses cite timeliness, accuracy, and responsiveness as primary reasons for continuing partnerships with the firm. The ability to delegate financial oversight to experienced professionals, without the overhead of an in-house

accounting team, is another common factor mentioned by growing companies.

?The gap we continue to see is in mid-sized businesses that need more than a bookkeeper but don?t require a full-time internal accounting department,? the Managing Partner, Lawson James, added. ?Their service model fills that gap with structured processes, qualified advisors, and customized support plans.?

As part of its accounting service delivery, ClearPath CFO Advisory also helps clients prepare for investor presentations, lending applications, and tax audits by ensuring records are consistent, documented, and well-organized. These services have proven especially valuable for clients undergoing expansion, restructuring, or succession planning.

The firm?s regional presence has also allowed it to build strong working relationships with local CPAs, attorneys, and compliance officers. In cases where coordination with outside professionals is required, ClearPath CFO Advisory?s accounting team facilitates that collaboration to ensure smooth processes and unified financial strategies.

This recent growth in California complements the company?s longer-term plan to offer regionally grounded financial services supported by national expertise. By maintaining a strong understanding of the local market conditions and regulatory landscape, the firm is able to tailor its services while maintaining consistent quality standards.

ClearPath CFO Advisory is also investing in internal team development to support the expanded accounting services. Ongoing training, credentialing, and industry research ensure the firm remains at the forefront of small business accounting standards and practices.

The full-service accounting expansion is now operational and available to new and existing clients in the listed California markets. Business owners who are interested in exploring ClearPath CFO Advisory?s accounting programs can request a consultation through the firm?s official website or by contacting the Walnut Creek office directly.

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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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