



ClearPath CFO Advisory Announces Expansion of Bookkeeping Services

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ClearPath CFO Advisory has confirmed the expansion of its bookkeeping services to a wider network of businesses across Northern California. The development follows an increase in demand from small and mid-sized enterprises seeking reliable financial management and compliance support.

Headquartered in Walnut Creek, the firm provides bookkeeping, accounting, payroll, and Fractional CFO services. Its latest expansion extends professional recordkeeping to organizations in areas such as Concord, Pleasanton, Oakland, Fremont, Pittsburg, Berkeley, and Sunnyvale. The goal is to deliver accurate, GAAP-compliant financial statements and reconciliations that help owners navigate increasingly complex reporting requirements.

"Every business decision is stronger when it is based on accurate information," said Lawson James, Managing Partner of ClearPath CFO Advisory. "The ClearPath CFO Advisory team has worked alongside business owners who needed clarity to act with confidence. Through this expansion, the firm is making that

clarity available to more companies across Northern California.?

Accurate bookkeeping remains fundamental to business stability. Disorganized or outdated records can result in cash flow challenges, missed tax deadlines, and regulatory penalties. The expansion reflects ClearPath CFO Advisory's commitment to addressing these risks by ensuring that companies have access to properly maintained ledgers, timely reconciliations, and transparent financial reports.

The firm's service model includes daily transaction processing, invoice management, and reconciliation of bank and credit accounts. It also assists with accounts payable and receivable tracking, providing business owners with an organized view of cash flow. For organizations with legacy issues or overdue reconciliations, ClearPath CFO Advisory offers cleanup services to restore financial clarity and correct historical inaccuracies.

Industry observers note that regional businesses, particularly in sectors such as construction, technology, professional services, and hospitality, are turning more frequently to outsourced financial support. Outsourcing reduces the burden on internal staff, saves time, and decreases the likelihood of costly reporting errors. ClearPath CFO Advisory's expansion aligns with this trend, enabling more businesses to secure accurate data without the need to build internal bookkeeping departments.

The timing of the expansion is also significant, given recent federal tax law changes. Provisions included in the 2025 legislation, such as permanent full expensing for qualified property and enhancements to the Qualified Business Income deduction, have renewed the emphasis on accurate, timely records. Businesses that maintain organized financial statements are better positioned to benefit from these changes and meet stricter reporting standards for tax and regulatory compliance.

ClearPath CFO Advisory distinguishes itself through its background as former business owners. This experience shapes its approach to presenting financial reports in ways that are clear, actionable, and relevant to everyday decision-making, rather than limited to technical or compliance-based perspectives. Clients receive not only reconciled accounts but also insights that can guide long-term planning, investment choices, and operational improvements.

Small and mid-sized enterprises remain at the center of the region's economy,? Lawson James added. ?As enterprises encounter increasing complexity in how they report and plan, ClearPath CFO Advisory's role is to ensure that business owners have access to information they can rely on.?

The expansion into new service areas highlights the firm's ongoing role in supporting business resilience. Access to dependable bookkeeping has become a factor in securing financing, meeting investor expectations, and protecting against financial missteps. Banks and lenders continue to place greater scrutiny on applications, making properly documented financial records a critical asset for companies seeking growth

capital.

ClearPath CFO Advisory has emphasized its focus on responsive communication, real-time updates, and transparent documentation. Clients benefit from consistent reporting intervals and direct access to information needed for compliance and operational oversight. By making accurate bookkeeping more widely available, the firm aims to provide business owners with the foundation needed for strategic growth.

With the expansion underway, ClearPath CFO Advisory is expected to play a greater role in helping organizations adapt to evolving financial challenges. Its combination of technical bookkeeping knowledge, practical entrepreneurial perspective, and emphasis on clarity positions the firm as a trusted partner for businesses navigating today's marketplace.

About ClearPath CFO Advisory

ClearPath CFO Advisory is a financial services firm based in Walnut Creek, California. The company provides bookkeeping, accounting, payroll, and Fractional CFO services to small and mid-sized businesses. Founded by former entrepreneurs, ClearPath CFO Advisory delivers financial reporting and advisory support designed to improve compliance, strengthen planning, and help clients achieve long-term growth.

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ClearPath CFO Advisory (CA)

ClearPath CFO Advisory helps small and mid-sized businesses in Walnut Creek with accounting, bookkeeping, payroll, and fractional CFO services. With 22+ years of QuickBooks expertise, they simplify finances so entrepreneurs can scale confidently.

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