ClearPath CFO Advisory Announces Expansion of Professional Accounting Services Across Northern California

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WALNUT CREEK, CA - December 15, 2025 -
ClearPath CFO Advisory has announced the expansion of its professional accounting services to additional Northern California communities, including Concord, Pleasanton, Oakland, Fremont, Pittsburg, Berkeley, and Sunnyvale. The expansion reflects growing demand from businesses seeking reliable financial oversight and strategic accounting support in an increasingly complex regulatory environment.

Headquartered in Walnut Creek, ClearPath CFO Advisory has built its practice on providing accurate financial reporting and trusted guidance for small and medium-sized enterprises. The firm?s accounting services go beyond preparing financial statements, encompassing compliance, forecasting, and analysis that inform business decision-making. By extending these services to more regions, the firm aims to give business owners access to timely information that supports both daily operations and long-term planning.

Accurate accounting has become increasingly important as businesses face heightened expectations from

lenders, regulators, and investors. Reliable financial statements are often prerequisites for securing loans, attracting investment, or negotiating vendor contracts. For companies that lack in-house expertise, outsourcing accounting services provides an efficient and cost-effective alternative. ClearPath CFO Advisory offers business owners a structured approach that includes monthly financial reporting, compliance monitoring, and customized analysis designed to meet the specific needs of each client.

?Accounting is the language of business,? said Lawson James, Managing Partner of ClearPath CFO Advisory. ?When records are accurate and timely, owners and executives can make decisions with clarity. Expanding its accounting services means more businesses will have access to information they can trust, which is critical for both stability and growth.?

The expansion comes during a period of economic adjustment in California, where businesses are managing inflationary pressures, evolving tax policies, and shifting labor costs. For many, professional accounting services offer a way to maintain financial transparency while also preparing for changes that affect profitability and compliance. The firm?s expertise with QuickBooks and other accounting systems allows for consistent, GAAP-compliant reporting that can withstand scrutiny from auditors, financial institutions, and tax authorities.

ClearPath CFO Advisory?s approach is informed by the perspective of its leadership, who were business owners before becoming financial service providers. This background has shaped the firm?s philosophy of simplifying complex financial concepts into insights that business owners can act upon. Accounting reports are designed not only to meet compliance standards but also to highlight opportunities and risks that might otherwise go unnoticed.

The expanded accounting services will include preparing income statements, balance sheets, and cash flow statements, and a deeper analysis of financial ratios, expense trends, and revenue growth patterns. These reports help business owners assess performance, measure efficiency, and make informed choices regarding staffing, investments, and expansion. For companies with more complex needs, ClearPath CFO Advisory provides budgeting support, forecasting, and assistance with strategic financial planning.

Local business advocates have emphasized the importance of reliable accounting as a foundation for resilience. In competitive markets such as the East Bay and Silicon Valley, where businesses often scale quickly, accurate records are critical for ensuring that growth does not outpace financial capacity. Accounting services provide the structure needed to manage that growth responsibly, reducing the risk of unexpected shortfalls or compliance issues.

?Businesses often think of accounting as a compliance requirement, but in practice, it is a tool for navigating change,? Lawson James added. ?Financial statements tell the story of where a business has been and where it is headed. Having that story presented clearly gives owners the ability to chart their course with

confidence.?

This expansion of services also underscores a shift in how regional companies view financial management. Increasingly, businesses that once managed records internally are choosing to outsource accounting for greater accuracy, independence, and cost savings. By partnering with a professional firm, they gain access to expertise that can reduce errors, minimize tax risk, and improve operational efficiency.

The expansion is expected to particularly benefit industries with complex reporting requirements, such as professional services, construction, technology, and retail. In these sectors, frequent reconciliations and detailed reporting are essential for meeting contractual obligations and investor expectations. ClearPath CFO Advisory?s accounting services provide the level of consistency and transparency that these industries demand.

In addition to traditional reporting, the firm offers guidance on accounting methods and compliance with evolving tax standards. This includes ensuring that clients remain aligned with GAAP requirements and are prepared for potential audits or financial reviews. By maintaining organized and accurate records, businesses reduce their risk of penalties and strengthen their credibility with stakeholders.

As accounting standards continue to evolve, particularly in the wake of new federal tax legislation, proactive planning has become increasingly important. Professional accounting services not only address current requirements but also anticipate future changes, helping businesses stay ahead of regulatory updates. ClearPath CFO Advisory positions itself as a partner in that process, ensuring that its clients are prepared for what lies ahead.

With this expansion, the firm reaffirms its role as a trusted financial partner for Northern California businesses. By combining technical expertise with practical business insight, ClearPath CFO Advisory delivers accounting services that support compliance while also contributing to long-term strategy.

About ClearPath CFO Advisory

ClearPath CFO Advisory is a Walnut Creek?based financial services firm providing bookkeeping, accounting, payroll, and Fractional CFO services across Northern California. Built by former business owners, the firm offers tailored financial solutions designed to simplify operations, enhance compliance, and provide actionable insights that drive growth.

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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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