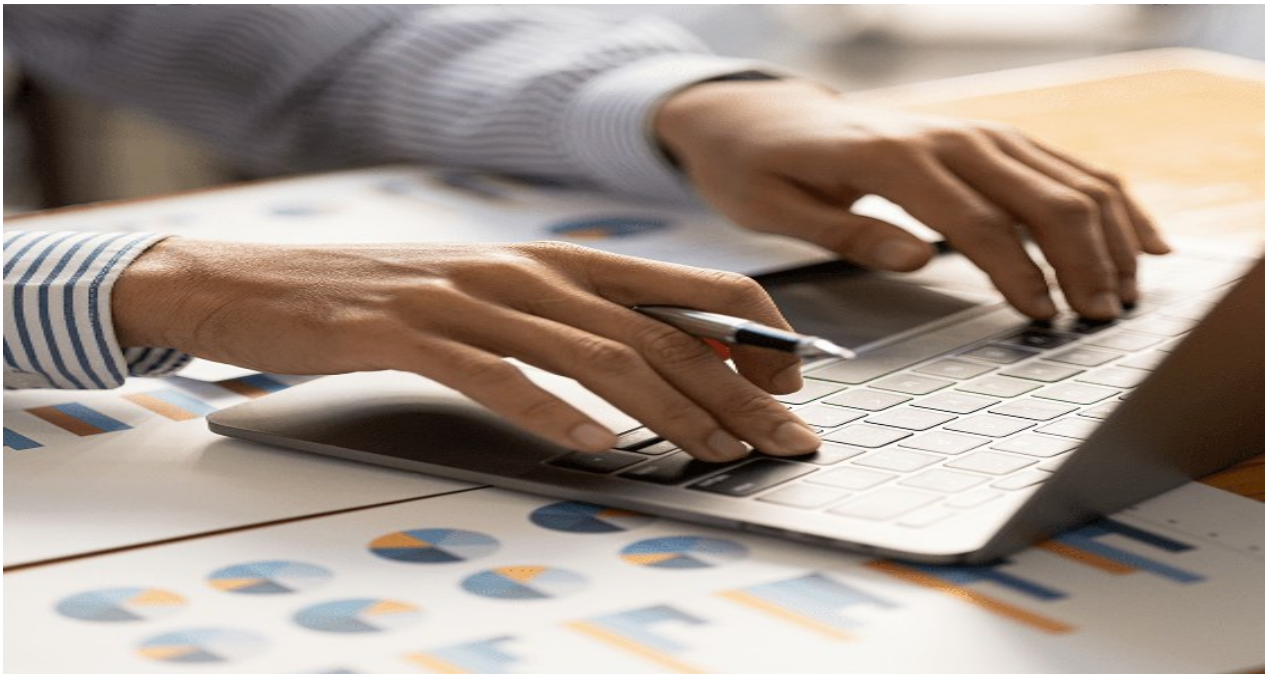

ClearPath CFO Advisory Expands Fractional CFO Services to Support Northern California Businesses

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WALNUT CREEK, CA - January 02, 2026 -
ClearPath CFO Advisory announced today that it has expanded access to its Fractional CFO services across additional Northern California communities, including Concord, Pleasanton, Oakland, Fremont, Pittsburg, Berkeley, and Sunnyvale. The expansion reflects increasing demand from small and medium-sized businesses seeking executive-level financial strategy without the full-time cost of an in-house chief financial officer.

Fractional CFO services provide companies with access to experienced financial leadership on a part-time or project basis. For many growing businesses, hiring a full-time CFO is neither affordable nor necessary, yet the need for forward-looking financial guidance is critical. ClearPath CFO Advisory?s expanded services are designed to bridge that gap by delivering the expertise of seasoned financial professionals in a flexible format.

?Not every business needs a full-time CFO, but nearly every business can benefit from strategic financial

leadership,? said Lawson James, Managing Partner of ClearPath CFO Advisory. ?The goal is to provide that level of insight on terms that fit the size, stage, and goals of each client. By expanding access to Fractional CFO services, ClearPath CFO Advisory is making strategic financial planning available to more businesses that otherwise might go without it.?

Fractional CFO services typically include financial forecasting, cash flow management, budgeting, and profitability analysis. They also encompass scenario planning, debt and equity financing support, and guidance on tax-efficient entity structuring. By engaging a part-time CFO, business owners can evaluate risks, prepare for growth, and implement systems that improve stability and scalability.

ClearPath CFO Advisory has built its Fractional CFO offering with an emphasis on practical, data-driven strategy. The firm integrates financial modeling with real-time business analysis, helping clients identify opportunities and prepare for potential challenges. Whether guiding a startup through its early funding rounds or supporting an established company with multi-state operations, the Fractional CFO role is designed to provide clarity and direction.

The decision to expand these services aligns with broader trends in the California economy. Many regional businesses are operating in fast-moving industries such as technology, healthcare, and professional services, where agility is essential. Having access to a financial leader on a flexible basis enables these companies to adapt quickly without carrying the long-term overhead of a permanent executive hire.

In addition, recent changes in federal tax law and ongoing shifts in California?s regulatory environment underscore the need for proactive financial planning. Companies that take advantage of Fractional CFO services can stay ahead of evolving requirements while also identifying opportunities for tax savings, credit eligibility, and investment optimization. ClearPath CFO Advisory?s experience in coordinating with tax attorneys and compliance professionals allows its clients to benefit from an integrated financial strategy and risk management.

?Fractional CFO services are not just about reporting what has already happened,? Lawson James added. ?They are about anticipating what might happen next. ClearPath CFO Advisory?s role is to help business owners prepare for those possibilities so that they can act from a position of strength rather than reaction.?

Businesses using Fractional CFO services often report improvements in decision-making and operational efficiency. By outsourcing this role, companies gain access to financial dashboards, cash flow forecasts, and profitability tracking that provide a clearer picture of their overall performance. For industries with complex revenue streams or seasonal fluctuations, this level of oversight can mean the difference between sustained growth and unexpected shortfalls.

The expanded services are expected to be particularly valuable for small and medium-sized businesses that are navigating growth transitions. These may include entering new markets, expanding operations, or pursuing external investment. A Fractional CFO can provide the strategic guidance needed to evaluate options, structure deals, and manage risks associated with expansion.

Local business organizations have noted that the increasing availability of outsourced executive services is changing how companies build their leadership teams. Rather than relying exclusively on traditional staffing models, many businesses are adopting flexible approaches that provide access to specialized expertise when and where it is needed. The expansion of Fractional CFO services is part of this larger shift toward more adaptive business management.

ClearPath CFO Advisory distinguishes itself by combining financial expertise with firsthand entrepreneurial experience. Its leadership understands the pressures of running a business and applies that perspective to help clients align financial strategy with real-world operations. Reports and forecasts are presented in straightforward terms, enabling owners to take immediate action without being overwhelmed by complexity.

The firm also emphasizes the importance of collaboration. Fractional CFO services often involve working closely with bookkeepers, accountants, and legal advisors to create a coordinated approach. This ensures that business owners receive not only a forward-looking strategy but also integrated support across every financial function, strengthening both compliance and operational efficiency.

With this expansion, ClearPath CFO Advisory reinforces its role as a trusted partner for businesses seeking both stability and growth. By making Fractional CFO services available to more communities, the firm is extending its mission of providing clarity, compliance, and actionable financial insight to companies across Northern California.

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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