



Experienced financial leadership. Practical execution. Stronger financial operations.

NorthPoint Executive Partners provides fractional CFO and Controller services, financial transformation, project accounting, and management consulting to privately held, owner-led, and growing businesses.

We work alongside owners and executive teams to strengthen financial operations, improve visibility, solve accounting challenges, and build sustainable financial infrastructure.

Our Services

Fractional CFO & Controller Services

Experienced financial leadership without the cost or commitment of adding a full-time executive.

Interim Financial Leadership

Controller and CFO support during transitions, vacancies, acquisitions, rapid growth, or periods of financial change.

Financial Transformation & Cleanup

Assessment and remediation of accounting environments that have become unreliable, inefficient, undocumented, or difficult to manage.

Project Accounting & WIP

Financial oversight for construction, HVAC/mechanical, specialty contractors, and other project-based businesses.

Financial Assessments

Independent evaluation of accounting processes, financial reporting, controls, reconciliations, close procedures, staffing, and financial infrastructure.

Management Consulting

Practical financial and operational support for owners and leadership teams facing growth, transition, process, or organizational challenges.

Who We Serve

Privately held and owner-led businesses • HVAC & Mechanical • Construction & Specialty Contractors • Project-Based Businesses • Service Organizations • Newly Acquired & Growing Companies



FINANCIAL LEADERSHIP THAT LEAVES THE BUSINESS STRONGER

NorthPoint engagements are designed around the business—not around a predetermined package of hours.

Every engagement begins by understanding the organization's financial environment, immediate priorities, existing team, and desired outcome. NorthPoint then provides the appropriate level of financial leadership and hands-on execution.

CEMS™ — Controller Engagement Management System

NorthPoint's proprietary CEMS™ methodology provides a consistent framework for evaluating, strengthening, and operating a company's financial environment:

Assess → Diagnose → Remediate → Standardize → Stabilize → Operate / Transition

The methodology is consistent. The execution is customized to each organization.

Engagements May Include

Fractional or interim Controller/CFO leadership • Month-end close oversight • Financial statement preparation and review • Cash-flow management and forecasting • WIP and job-cost reporting • Accounting cleanup and reconciliation • Internal controls • Process development • SOP and documentation development • Accounting staff oversight • Acquisition integration • Executive financial reporting • Transition and handoff support

Our Approach

NorthPoint does not simply identify problems and leave management with a report.

When appropriate, we work alongside the company's existing team to correct the underlying issues, establish sustainable processes, document the financial environment, and provide ongoing leadership until the organization is ready for the next stage.



ANITA KOTRLIK

Founder & Managing Partner

Anita Kotrlik brings more than 30 years of experience in accounting, financial leadership, and operational management across industries including **HVAC/mechanical services, construction, facilities management, service organizations, and nonprofit organizations.**

Beginning her career in entry-level accounting, Anita advanced through A/P, A/R, staff accounting, Controller, and Chief Financial Officer roles. That progression gives her a practical understanding of financial operations from the transactional level through executive leadership.

Throughout her career, Anita has provided financial leadership to organizations ranging from **\$6 million to more than \$800 million in annual revenue**. Her experience includes financial reporting, budgeting and forecasting, cash-flow management, project accounting, WIP, financial and operational analysis, process improvement, internal controls, and strategic planning.

As Founder and Managing Partner of NorthPoint Executive Partners, Anita works with business owners and executive teams to strengthen financial operations, improve financial visibility, resolve accounting and reporting challenges, and build sustainable financial infrastructure.

With advanced degrees in Business Management, Finance and Human Services, her approach combines executive-level financial leadership with hands-on operational experience and a simple philosophy:

Financial information should do more than report what happened. It should give leadership the information they need to decide what happens next.