

# FINANCIAL SERVICES REVIEW

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**CORPORATE  
ADVISORY  
EDITION**



**Avant Advisory Group**

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## Avant Advisory Group



*The annual listing of 10 companies that are at the forefront of providing Corporate Advisory services and impacting the marketplace*

# Avant Advisory Group

## Serving the Middle Market with a Value-Driven Approach

Corporate advisory firms are a mainstay in the financial management space. They offer a wide range of services, including financial planning and analysis, M&A advisory, strategic and restructuring consulting, and more, to help companies maximize their financial positions, profitability, and opportunities.

Their importance is rising as businesses become increasingly complicated and require more sophisticated financial management and operational strategies. This is never more important than during the unsettling economic times to we are now experiencing. No one does this better than Avant Advisory Group, a leading corporate advisory firm that helps companies in the middle market across the country increase their value by helping improve profitability, cash flows, and financial strength, among other things.

Avant Advisory is comprised of seasoned financial and operational experts, including certified public accountants (CPAs) that specialize in niches such as mergers & acquisitions, financial forensics, and fraud investigations; certified turnaround professionals (CTPs) and certified insolvency & restructuring advisors (CIRAs) focusing on underperforming and distressed companies. Avant's team of certified experts and former senior C-Suite executives offers professional insights and technical expertise associated with mergers & acquisitions, financial restructurings and operational turnarounds, performance and profitability improvement, financial forensics, fraud, and corporate investigations, and expert witness litigation support.

Avant's multidisciplinary team has allowed the firm to be quick, flexible, and dynamic with "hit the ground running" responsiveness to client needs.

"Our highly experienced and credentialed consultants can handle more than one area of specialization, mostly with two to three transferrable skillsets, making them highly versatile and efficient. This oftentimes limits the need for multiple people, which other firms may require

on a single engagement," says James F. Davidson, Avant Advisory Group's founder and president.

For instance, a client may be acquiring a company that is experiencing financial and/or operating challenges (perhaps even severely distressed), and it also has accounting and financial reporting issues. One of Avant's professionals who is a forensics credentialed CPA and is also a CTP and/or CIRA, and a Certified Merger & Acquisition Advisor would be an ideal choice for providing a broader perspective and a comprehensive solution. Similarly, if a client needs help with a corporate investigation, a forensics specialized CPA who is also a Certified Fraud Examiner can conduct a fraud examination without additional expertise. This way, Avant provides higher caliber resources with much more efficiency, while reducing cost and maximizing value for the client.

Avant's targeted segment is the middle market comprised of companies having annual revenues in the \$50 million to \$500 million range. The majority of Avant's clients, many of which are borrowers or portfolio companies or clients of the nation's largest banks, alternative lenders, private equity firms, family offices, and law firms primarily range from \$25M to \$250M in revenues. As an operationally focused and financial advisory management consulting firm,

Avant is highly driven to secure value for its clients. One of the firm's core practice areas aims to help clients improve cash flows, profitability, and EBITDA (earnings before interest, income taxes, depreciation, and amortization) that increase overall company value.

When a company or potential client contacts Avant for help, the firm ensures that it understands their requirements, priorities, and concerns. Avant's objectives is to evaluate the project's scope, the client's goal, and identify underlying problems to ensure it can provide maximum benefit to the client.

"Are we the right fit?" is the firm's first question before



James F. Davidson  
 Founder & President



taking on any project. If the answer is no, Avant will try to be helpful by recommending another firm suited to those specific needs. This is an example of Avant's commitment to delivering the right solution, even if it means saying no but referring to someone that might be the right match.

If the answer is yes, Avant also seeks to confirm there is good chemistry and mutual trust. It aspires to work with clients that are a good fit and align with its Biblical values.

Integrity, honesty, and Biblical principles are the bedrock on which Avant builds its relationships. That is the basis on which the firm strives to be the best at what it does and sets high standards for itself. This includes providing excellent services and ensuring every project has the potential to add maximum benefits to its clients.

In one instance, Avant was approached by a company to forensically investigate a potential fraud. The firm found the underlying problems within days and assisted the client in restating the financials, while interfacing with banks and its big four accounting firm. It then began to immediately focus on generating much-needed cash and turning around the company to ensure its survival. Davidson became the Chief Restructuring Officer and then interim CFO of the Company until a new CFO was hired and brought up to speed.



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Avant is excited about the roll out of its proprietary software called the Avant Edge™ Profit Optimizer, which helps companies improve profitability, cash flows, and EBITDA to increase overall company value. The firm is also expanding its footprint in the middle market following a recent merger that now enhances its capabilities in IT systems assessments and implementations. One thing that will remain is Avant's relentless value-driven focus and commitment to providing highest quality services and solutions to its clients. **fs**