

PERRIN & CO.

FINANCIAL · ACCOUNTING · BUSINESS ADVISORY

Firm Overview

Experienced financial judgment for the privately held business — advisory across debt and liquidity, executive finance, transactions, strategic execution, restructuring, and technology.

SCAN TO
EXPLORE



NATIONAL MANAGING DIRECTOR PLATFORM

PERRIN-CO.COM

THE FIRM

Institutional pedigree.

Middle-market focus.

Perrin & Co. brings senior, hands-on financial leadership to privately held businesses — the kind of counsel larger companies take for granted, delivered without the overhead of a permanent hire. We advise ownership and executive teams on capital structure, finance and accounting leadership, business strategy, transaction and special situations, and the technology that makes a modern finance function faster and clearer.

Our judgment is grounded in commercial banking, executive CFO leadership, and institutional accounting experience. That combination lets us solve problems single-discipline firms cannot — and stand beside management when the stakes are highest.

WHAT WE BRING

Commercial Banking

Understanding the lender's perspective to optimize debt structure and covenants.

Executive CFO Leadership

Operating as true financial partners, not just external consultants.

Big Four Experience

Bringing institutional accounting rigor to the middle market.

Governance & Controls

Strengthening internal controls, governance, and the finance operating model.

Institutional Credit

Deep expertise in credit facilities and capital raising.

Operational Finance

Connecting financial metrics to day-to-day operational realities.

WHO WE SERVE

Owner-led, family-owned, and sponsor-backed businesses nationwide — the operators and investors who build, grow, and steward real enterprises.

AGRICULTURE

CONSTRUCTION

MANUFACTURING

DISTRIBUTION & LOGISTICS

REAL ESTATE

HEALTHCARE

PROFESSIONAL SERVICES

SPONSOR-BACKED COMPANIES

AND MORE

CAPABILITIES

Four Practice Areas.

Ten Specialized Capabilities.

01 Capital Structure

CAPITAL DECISIONS GUIDED BY EXPERIENCED FINANCIAL JUDGMENT

Debt capacity and strategy, acquisition financing, refinancing, recapitalization, liquidity, liability management, covenant compliance, lender negotiations, and financial restructuring — advice grounded in how lenders evaluate risk.

02 Finance & Accounting Advisory

EXECUTIVE FINANCE LEADERSHIP, WITH THE CONTROLS TO MATCH

Interim and fractional CFO leadership, controller support, board- and lender-grade reporting, governance and COSO-aligned controls, accounting policies and procedures, technical accounting, ERP support, and finance-function improvement.

03 Business Advisory

COUNSEL FOR THE DECISIONS THAT DEFINE THE BUSINESS

Strategic planning, feasibility studies, interim executive management, performance improvement, buy- and sell-side transaction advisory, restructuring, succession, organizational transformation, and executive decision support.

04 Technology Solutions

MODERN FINANCIAL INFRASTRUCTURE, DEPLOYED WITH INTENT

Finance-system strategy and implementation, AI workflow and reporting automation, dashboards, business intelligence, data analytics, and custom technology — including LORIQ™ — deployed with executive judgment guiding the tools.

TEN SPECIALIZED CAPABILITIES

Technical depth applied collaboratively across the firm's four Practice Areas.

01 Commercial Banking & Institutional Credit

02 Commercial Real Estate

03 Debt & Liquidity Advisory

04 CFO & Financial Leadership

05 Finance Function Improvement

06 Corporate Tax Planning & Strategy

07 Strategic Execution & Performance

08 Mergers & Acquisitions

09 Finance Systems & Automation

10 Restructuring & Special Situations

THE PERRIN & CO. ECOSYSTEM

Integrated expertise. *Independent solutions.*

PERRIN & CO.

FINANCIAL ACCOUNTING BUSINESS ADVISORY

ADVISORY

Executive financial and business advisory — the primary relationship at the center of the ecosystem.

MERIDIAN

ACCOUNTING & TAX SERVICES

Accounting, tax, financial reporting, and advisory services for privately held businesses and business owners.

LORIQ

TECHNOLOGIES

TECHNOLOGY

Proprietary financial technology — credit intelligence, automated workflows, and decision dashboards — that extends what a lean finance function can accomplish.

HOW WE WORK

I UNDERSTAND

Deep dive into your business model, current financial state, and strategic objectives.

II ASSESS

Identify gaps in reporting, capital structure, controls, or operations.

III DESIGN

Develop a bespoke architectural plan for the finance function or transaction.

IV IMPLEMENT

Deploy new processes, technology, and strategic frameworks into operation.

V MONITOR

Track KPIs, covenant compliance, and financial performance against targets.

VI IMPROVE

Continuous iteration and executive advisory to support ongoing growth.

BEGIN THE CONVERSATION

Request a confidential
consultation.

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