

# Wise Business Plans Launches Wise Advisory Division to Bridge Strategy, Capital, and Execution

*The new Wise Advisory Division expands beyond planning into execution, M&A, fractional CFO services, and AI-driven financial strategy.*

LAS VEGAS, NV, UNITED STATES,

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Wise Business Plans<sup>®</sup>, a U.S.-based business planning and advisory firm

with more than 15,000 completed business plans and over \$2 billion in funding supported, today announced the launch of the Wise Advisory Division, a strategic expansion designed to help organizations move from planning to execution, transactions, and long-term value creation.

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The Wise Advisory Division was created to help organizations move from planning to execution, transactions, and long-term value creation in an increasingly complex capital environment.”

*Dorothy Anderson*

The Wise Advisory Division expands the firm's role beyond traditional business plan development by offering integrated advisory services that include fractional CFO services, mergers and acquisitions (M&A) advisory, IPO preparation support, AI-driven predictive modeling, and enterprise-level strategic consulting. The division was developed in response to increasing complexity across capital markets, heightened regulatory scrutiny, and growing demand for data-driven financial leadership.

Over the past decade, Wise Business Plans has worked

with entrepreneurs, growth-stage companies, institutional clients, and international founders navigating bank financing, private investment, government programs, and regulatory requirements. The launch of the Advisory Division reflects a broader evolution in client needs, as businesses face tighter underwriting standards, more rigorous investor due diligence, and greater expectations for financial transparency and operational discipline.

“Businesses today face far more scrutiny from lenders, investors, and regulators than in the past,” said Dorothy Anderson, Manager at Wise Business Plans. “The Wise Advisory Division was



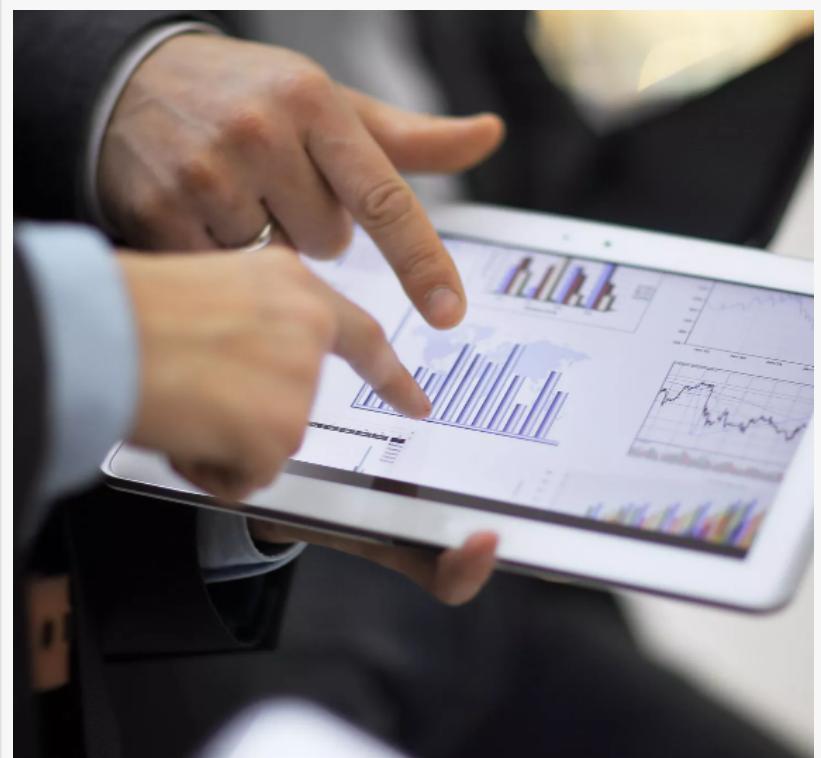
created to support organizations not just at the planning stage, but throughout execution—helping them prepare for capital events, manage growth responsibly, and make informed, forward-looking decisions.”

The Wise Advisory Division is designed to support companies across critical inflection points, including capital raises, acquisitions, succession planning, operational scaling, and public-market readiness. By combining strategic planning with ongoing financial oversight, Wise aims to provide clients with continuity between planning assumptions and real-world execution.

As part of the division, Wise offers fractional CFO services to help organizations strengthen financial controls, cash flow management, reporting frameworks, and capital strategy without the overhead of a full-time executive hire. These services are particularly relevant for founder-led businesses and mid-market companies preparing for financing or transactions.

The Advisory Division also includes M&A advisory and transaction support, assisting business owners and executives in preparing for acquisitions, mergers, and exits. This includes financial modeling, scenario analysis, deal-readiness planning, and coordination with legal, tax, and investment professionals. Wise’s transaction-related work builds on its experience producing business plans, valuations, and investor materials used in lower- and middle-market transactions.

In response to growing interest in advanced analytics, Wise has incorporated AI-driven predictive modeling and financial forecasting tools into its advisory offerings. These tools are used to stress-test assumptions, evaluate downside risk, and model multiple growth and capital



Predictive Modeling



M&A Advisory

scenarios, helping decision-makers better understand the implications of strategic choices in uncertain market conditions.

"The expectation today is not just a compelling narrative, but defensible financial logic and operational clarity," Anderson added. "Our advisory work is focused on helping clients meet that standard consistently, whether they are seeking capital, preparing for a transaction, or planning long-term growth."

The launch builds on Wise Business Plans' experience serving clients across 400+ industries, including professional services, healthcare, life sciences, franchising, government contracting, manufacturing, real estate, and technology. The firm is widely known for producing SBA-ready, investor-grade, and regulatory-compliant business plans used for bank financing, private investment, immigration filings, and strategic initiatives.

By formalizing the Wise Advisory Division, the firm aims to deepen long-term relationships with clients and provide continuity across planning, execution, and performance. The division complements Wise's established business planning services by extending support beyond initial documentation into ongoing strategic and financial advisory work.

The Wise Advisory Division reflects a broader shift within the firm toward helping organizations align strategy, capital, and execution in an increasingly complex business environment.

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#### About Wise Business Plans

Wise Business Plans® is a U.S.-based business planning and advisory firm specializing in SBA-ready, investor-grade, and regulatory-compliant business plans, financial models, and strategic advisory services. Serving clients across the United States and internationally, the firm has completed more than 15,000 business plans across 400+ industries and has supported over \$2 billion in funding initiatives. Wise Business Plans works with entrepreneurs, corporations, investors, and institutions seeking disciplined planning, financial clarity, and long-term growth.

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