URSA
CONSULTANTS INC

From Bookkeeping to Fractional CFO: How Ursa Helped Vinyl Equity Scale

Client: Rob Schoder Jr., Founder & Managing Partner, Vinyl Equity
Industry: Transfer Agent Software for Public Company Annual Meetings

The Challenge

When Rob Schoder launched Vinyl Equity, he was juggling product development, customer growth, and, on top of it all, financial operations. Like many founders, he knew finance wasn't where his time should go, but handing it off required trust.

Initially, Rob approached Ursa as a bookkeeping partner — a cost-effective, laid-back alternative to stiff corporate firms. His expectation was simple: *someone to keep the books clean and payroll running smoothly*.

But very quickly, his needs grew:

- Delegation of financial operations
- Strategic guidance for fundraising and cash flow
- Fundraising and acquisition support

> **"I needed an expert to handle the business's finances — because I knew I should be doing other things to support our growth."**

How Ursa Helped

What started as bookkeeping turned into a strategic partnership. Jace, Ursa's founder, became Rob's go-to financial partner.

- **Fundraising Support —** Managed diligence, data, and terms so the founder could stay focused on growth.
- **Equity Financing Support —** Ursa handled the tactical heavy lifting alongside Rob's investor conversations.
- **Operational Finance Oversight —** Payroll, AR, and multi-bank logistics, keeping day-to-day operations humming.

This shift saved Rob enormous amounts of time, allowing him to focus on fundraising, product development, and scaling the business. Ursa became a fractional CFO, not just a bookkeeping service.

The Results

By partnering with Ursa, Vinyl Equity gained:

- **Massive time savings —** Rob stepped out of the weeds of finance to focus on growth.
- **Trust & accountability —** Critical workflows, like debt and equity raises, were executed end-to-end.
- **Strategic leverage —** A financial partner who could "see around corners" and guide key decisions.

> "It was good to know I could trust Jace to push things over the line."

> "I need to know the finances are dialed in — so when we graduate to a full–time CFO, it's not a mess."

Looking Ahead

Vinyl Equity's future needs include:

- Support for potential acquisitions and integration.
- Professionalized monthly financial packages with digestible insights.
- A roadmap of "what good looks like" as the company scales, ensuring a seamless graduation to a full-time CFO.

Why This Matters for Founders

Rob's journey is one many founders share: starting with bookkeeping needs, then realizing they need more. Ursa's ability to scale from tactical execution to strategic CFO support is one of the key levers that allowed Vinyl Equity to focus on growth while fundraising.

Who this resonates with:

- Growth-stage founders balancing finance with scaling.
- Lean teams preparing for debt or equity raises.
- CEOs who want a partner, not just a vendor.

Key value props:

- Offload finance without losing insight.
- Get financial reporting that tells a story.
- Build a graduation-ready finance function.

Are You a Founder Looking for Strategic Finance Support?

Like Rob, you don't have to do it all. Ursa can be your partner to streamline operations, support fundraising, and set your company up for scalable success.

👉 **Contact Ursa today to explore how fractional CFO support can free you up to focus on growth.**