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## SDR Ventures Advises The CFO Project on Partnership with Broadtree Partners

SDR Ventures is pleased to announce that [The CFO Project](#) ("CFO Project" or "the Company") has been acquired by [Broadtree Partners](#).

Jeff Prager and Adam Lean founded The CFO Project in 2020 to bridge the gap between traditional accounting services and strategic CFO advisory work. The Company offers a membership-based mentorship platform designed for accountants, bookkeepers, CPAs, and other finance professionals seeking to build and scale a CFO advisory practice. Members gain access to an online resource hub, proprietary tools and templates, structured workshops, and experienced mentors, all aimed at helping participants acquire, deliver, and retain high-value CFO advisory engagements.

"The SDR Ventures team guided us through a complex process with remarkable skill, transparency, and care. We couldn't have done it without them," said Adam Lean, Co-Founder of The CFO Project.

The Company also offers NASBA-approved CPE-earning masterclasses, a Certified CFO™ credential, distinguishing its members in a competitive market. Recognized for its innovative approach to financial advisory and professional development, The CFO Project has become a trusted partner for professionals seeking to expand their impact, profitability, and career opportunities.

"With a proven approach in helping its members obtain and retain CFO Advisory clients, The CFO Project is poised to continue growing its community, network and exclusive events across the CFO and business advisory industry as the demand for business finance expertise continues to grow," said Johannes Zwick, Managing Partner at Broadtree Partners.

"We built the Company to give finance and accounting professionals a proven system so they can stop trading hours for income," said Jeff Prager, Co-Founder of The CFO Project.

"Partnering with SDR Ventures to sell our business showed us firsthand what it feels like to work with a team that brings clarity, confidence, and expertise every step of the way."

"Working with Jeff and Adam throughout this transaction was a seamless experience," said Ben Luchow, [Director](#) at SDR Ventures. "Their vision, execution, and dedication made this an exciting opportunity to bring the right partner and terms to the table, and we're thrilled to help them achieve a successful sale that reflects the true value of their business."

SDR served as the exclusive M&A advisor to The CFO Project during the transaction process. Fennemore served as the exclusive legal advisor to the Company.