

How Aimee LaLiberte helped Michael Sgro create a *solid financial foundation* for his business, *transform his relationship* with money, and increase his capacity *to do more of the work he loves*



“As a professional coach, my work can be emotional, and I like to be very invested in my clients. Aimee helped give me that capacity. I wasn’t worried about my books, my bookkeeping system, or my offers and pricing. She handled all of that, which freed me up to do what I do best.”

Michael Sgro
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When Michael Sgro reached out to Aimee LaLiberte to inquire about her bookkeeping and financial services, he was in the process of making a career pivot.

After 20 years in the higher education space, Michael was about to launch Michael Sgro Leadership Coaching, a private practice that specializes in helping professionals develop their leadership skills, emotional intelligence, and digital

savvy so they can create better relationships and communities.

Having worked for a business school for five years of his career, Michael knew what it took to start a business. **He also knew that there were certain portions of his business-building journey that he had no interest in handling on his own** — the biggest of which was the financial management.



“She convinced me in that first conversation that I can’t be scared of my finances, that I have to use real words to talk about money, and that the numbers don’t lie. She was matter-of-fact and made things simple, and I knew I wanted to hire her.”

“I knew the financial management of my business was not going to be for me,” Michael said. “I wasn’t detail-oriented enough to manage my own books. Finance just isn’t a part of my brain, and I don’t find it pleasurable. I knew that I wanted to pay someone competent to take over that aspect of my business for me.”

Michael had known Aimee for many years, but wasn’t familiar with her bookkeeping and fractional CFO business. A mutual friend and fellow business owner encouraged him to reach out to her.

“Aimee struck me immediately as someone who is so smart about finance,” Michael said. “She’s a direct communicator like I am, and that directness spoke to me and helped me build trust in her quickly.

With their partnership in place the two got to work, and Aimee began to set up the financial foundation for Michael’s business.

That included setting up his bookkeeping system where they could track all of the money coming in and out of his business; creating the structure for invoicing and receiving payments; as well as establishing his business as an LLC.

As part of Aimee’s service, Michael received monthly calls to go through his profit-and-loss statements in-depth, set goals for his monthly revenue, and establish a budget strategy.

“Most of those early conversations were me telling her what I needed to make each month,” Michael said. “She would tell me exactly what I needed to do to make it happen, as well as give me other scenarios that I could shoot for.

“She also analyzed my expenses, and would speak up when I needed to make important changes. For example, I’m a marketing person at heart and I spend a lot of money on marketing. She called that out as my biggest expense, and let me know that for my initial year it was okay, but that I would need to cut it in half for my second year’s budget. She was always helping me see what I needed to do to maximize my profit and cut down on expenses.”

Michael said an especially helpful part of his work with Aimee was the ledger she created to help him structure his service offerings and pricing.

“She helped me create a ledger that really framed my business,” Michael said. “She defined how I would label things and where I would put things. I still use that today. I have a clear understanding of my services, what I call them, and what they’re valued at.”

In addition, Aimee made sure Michael was completely prepared to file his annual tax returns.

“I do my own taxes but she got me totally ready for it,” Michael said. **“She captured all of the expenses that I could possibly include in my taxes — many of which I wouldn’t have even thought about. It was exceptional how thorough she was.”**



Yet Michael said that, in all of the help Aimee provided to him, **the most impactful was the guidance she gave him around his mindset — and his relationship — with money.**

When their work together began, Michael said he had a mental block about charging people and wanted to put clients on scholarships and give a lot of his work away for free.

“I didn’t believe in the whole idea of charging people when I started,” Michael said. “It felt wrong to me, especially because I was in business to help people. But Aimee helped me realize that my work is valuable and that I needed to charge for my



expertise. My clients are way more invested when I do, and I'm actually able to have a profitable business.

“Aimee helped me see that there is health in wealth.”

Aimee and Michael's partnership ran for three years, and he said he was thrilled with the results of their work together — results that were evident as early as year one.

“Nearing the end of my first year in business, I was already making a profit,” Michael said. “How many business owners can say that? That was all thanks to Aimee. Her knowledge and directness kept me

accountable and helped me do what I really needed to do to achieve what I said I wanted for my business.”

Michael said that in the second year of their partnership, he fully experienced the results of the mindset work they'd done together, and **he began to truly honor the value of his work — and its worth.**

That shift led him to take an important action.

“I started to send my own invoices,” Michael said. “I know it sounds crazy that I wanted to take on work that Aimee had been doing, but it was important to me because I wanted to acknowledge the accomplishment of what I'd earned.

“It's my favorite part of the work that Aimee and I have done together. I was able to fully own my value and my work's value, and I show that to myself by sending my own invoices. It was a huge shift.”

Michael said that, overall, the biggest benefit of his work with Aimee was the capacity she gave him to do more of the work he loves.

He notes, however, that while he was grateful that Aimee allowed him to be 100% hands-off with his bookkeeping, **their monthly calls and conversations**

were extremely valuable in teaching him about financial management.

“My understanding of money has increased because of her,” Michael said. “She’s made bookkeeping exciting. **She makes you feel like there’s a reason to nerd out about your finances.**

“Aimee makes you financially fluent through the work she’s doing and that’s incredibly valuable. It’s an education that can serve you in all aspects of your life.”

Michael said that there’s not a business owner around who couldn’t benefit from the value that Aimee brings, especially when it relates to such a sensitive aspect of a business.

“With Aimee you get 100% trust,” Michael said. “It’s very easy to feel vulnerable sharing your finances with someone, so having a relationship with a bookkeeper you trust is critical. Aimee makes it 100% safe. Plus, she’s funny and sarcastic, and she’s so easy to talk to.

“Aimee has been so fundamental to the success of my business, and I can’t imagine where it would be today without her.”

To learn more about how Aimee can help you create a solid financial foundation for *your* business, [click here.](#)

