

Business Financial Planning and Analysis

Profitability Analysis



- Where are the leaks?
- Where should I invest more heavily?
- How should I project for a new product or service?

Valuation Analysis



- How much is my company worth?
- How do we compare to our industry?
- How do we increase the value?

Cash Flow Planning



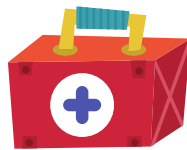
- Can I take a larger salary without hurting business growth?
- Are we prepared for a recession?
- How are we fueling growth?

Marketing Analysis



- What return are we getting for our spend?
- How are our funnel and conversion metrics?
- Are we spending enough/too much?

Risk Planning



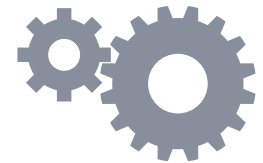
- Is the entity structure appropriate?
- Do we have adequate insurance coverage?
- Is the business prepared for a transition?

Tax Planning



- Are we paying too much now?
- Will we be paying too much later?
- Is a retirement plan appropriate for our business?

Operations Analysis



- Are our processes financially efficient?
- How do we scale more effectively?
- How do I work on the business more and not in the business as much?



Operating at the intersection of company and personal financial planning and analysis for business owners.

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