

Business Priority Analysis

Identify with a "1", "2", or "3" your top 3 priorities for the next (6) six months

1. Business Start-up _____
2. Business Turn-around: Improve Profitability, Operations, etc. _____
3. Develop / Implement a formal Budget Forecast _____
4. Operations issues: Staffing, Processes, HR, etc. _____
5. Debt Elimination _____
6. Establishing an Retained Earnings/Business Continuation Fund _____
7. Exit Strategy: Buy/Sell, Key Man Insurance, Generation Transfer _____
8. Effective Bookkeeping _____
9. Business Development: Marketing, Promotion, Advertising _____
10. IRS Issues _____
11. Other Goals (_____) _____

Explain _____

What issues would you like to discuss during your complimentary 30 min. consultation?
