



# ABOUT THE PRODUCT

## **Business Tactical & Financial Planning**

This is an opportunity to learn how to formulate a business plan and apply the tactical approach that allows you to use tools and output as a real-time guide to keep you on track to achieve your financial goals. The tools we will develop are customized and unique to how you prefer to conduct your business. There will not be another like it produced.

Together, we create a customized solution for how you, specifically, conduct your business. We will invest the necessary time in discovery to obtain a thorough understanding of your business. We will review every aspect of your business that is relevant to your financial plan. We will build the model in a manner which you are comfortable using while keeping consistent with successful Fortune 500 company structure.

You will learn concepts such as Variable Costs, Cost of Sales/Origination, Contribution Margin, and more. You will learn how to use your actual results to formulate a rolling forecast. enabling you to track of your goals. *Base metrics and 'right-lining' will be introduced.* The work product you create from this coaching is a foundational *investment* into your future and legacy which will benefit your business year after year for many years to come.

*This is a focused, hands-on coaching. Success requires a 6-month commitment from both the coach and the participating business owner. Participants will need to produce current month's profit and loss and volume reports.* In the first three months, attention is focused on discovery and approach to create the plan. From month two, we begin to work within the plan, creating the work product, conducting check-ins, and adjusting as needed.

A committed participant will have a functional, proven work product at the end of the six months of focused attention. If desired, an extension and continuation of coaching is available for an additional six months at a reduced rate.

One on one customized sessions include *six months of focused attention*:

- Month 1 – 3 sessions of discovery and development of approach
  - Session 1 – Overview and Discovery
  - Session 2 – Baseline and Goals
  - Session 3 – Review and Edit Plan
- Months 2 thru 6 Monthly sessions to review/check-in actual to plan and adjust if needed
- Month 6 includes a formulation of base Financial Forensic Metrics



Access will be provided to Session Slides, Notes, Operational Instructions, and Videos. Customization is provided throughout each segment. Access is provided to ask questions, receive explanations, and make minor plan edits, if needed.

Includes basic Excel instruction. Participant will need Excel or Google Sheets.

Participant will need to provide access to historical profit and loss and volume reports. Guidance will be provided if needed to obtain such.

#### 4 Seats Available

**Required Investment:** 6-month hands-on commitment learning and coaching to create the work product. Participation is limited and payment is front-loaded due to the intense amount of preparation to create the work product. \$2499.50 /month for 2 months.

**Optional Extension:** Additional 6-month of coaching to assist in monitoring and adjustment support of the work product. \$300 / month for 6 months to reach 1 year and achieve a full business cycle

## ABOUT THE CONSULTANT

Andy Tabag comes to us with an extensive mortgage background of 20+ years creating partnerships at all levels in sales, operations, corporate, executive, and individual business entrepreneurs. He is formally trained earning a major in accounting and a minor in finance while contributing his skill with several Fortune 500 companies.

Focusing on client partner specific needs and levels of understanding while tailoring a solution that is easy to understand and follow. He truly believes in taking complex concepts and delivering in a manner that is understood at all levels from the novice to the seasoned veteran.

He prides himself in being able to speak the client's language and thus articulating appropriately. Andy's value is endless as he can apply knowledge from several business industries to assist you in creating, monitoring, analyzing, and adjusting business plans as needed in order to achieve your goals. He possesses the unique ability to live and work in the details while keeping focused on vision and goals. He compares himself to you having the power of a successful Fortune 500 company accounting and finance department, your CFO at a fraction of the cost. Most of all the training, tools and value received will benefit you for many years to come.

