Path to Financial Independence For Your Business

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SVA's Certified Value Builders™ use a comprehensive approach to working with business owners to develop a strategy to achieve their goals. Whether you are just starting out and need assistance with developing processes, systems and procedures or if you are looking forward to retirement and determining the value of your business, we have the expertise you need.

Top 10 Things You Need to Know to Grow

As a busy business owner it is easy to spend time working IN your business rather than focusing ON your business. Consider these questions to determine if you are prepared to take the next steps to grow your business.

- 1. Do you know your business's strengths and weaknesses?
- 2. Are you focusing on what really counts?
- 3. Do you know your break-even point by product and/or service?
- 4. If you had the opportunity to grow 30%, do you have the resources in place to handle it?
- 5. Do you have a strategy to ensure repeat sales?
- 6. Can you identify what is unique about your business and how to capitalize on setting your business apart from your competitors?
- 7. Do you have an objective way to regularly measure customer satisfaction?
- 8. Is your financial reporting software working for you or against you?
- 9. Do you have a succession/exit plan that will work for you well into the future?
- 10. Are you taking advantage of all tax strategies to reduce your tax liability?

Using SVA's Path to Financial Independence, we can help you identify the areas to focus on to help you meet and exceed your business goals. The eight-step process provides the framework for future strategic direction.

PATH TO FINANCIAL INDEPENDENCE

SVA developed The Path To Financial Independence to guide you through the steps to success. This eight-step process will enable you to identify your business needs and determine future strategic objectives.

Explore Client Needs

- Identify the pain points
- Identify operational strengths and weaknesses
 - Identify business goals





Effective Financial Reporting

- Appropriate software selection
- Customized financial reporting
- Tailored accounting procedures and internal controls
- Management/Staff financial training

Evaluate Financial Reporting Systems

- Intacct (Cloud-based accounting program)
 QuickBooks
 - Sage 50 (formerly Peachtree)
- Sage 100 for Contractors (formerly Master Builder)





Strategic Tax Planning/Compliance

- Ongoing tax planning for individuals and businesses
- Income deferral and deduction acceleration techniques
- Tax credit analysis
- Cost segregation studies

Value Building

- The Value Builder System™
- Budgeting/Forecasting and Cash flow analysis
 - Identify Break-even point
 - Identify KPIs (Key Performance Indicators)
 - Revenue Enhancement





Succession/Exit Planning

- Mergers and acquisitions/due diligence
- Succession planning/buy-sell agreements
- Contingency planning
- Analysis of exit options

Estate Planning

- Create an estate plan
- Implement tax savings strategies
- Coordinate estate and exit plan





Retirement Planning

- Analysis of retirement needs
- · Financial planning strategies
- Retirement plan selection