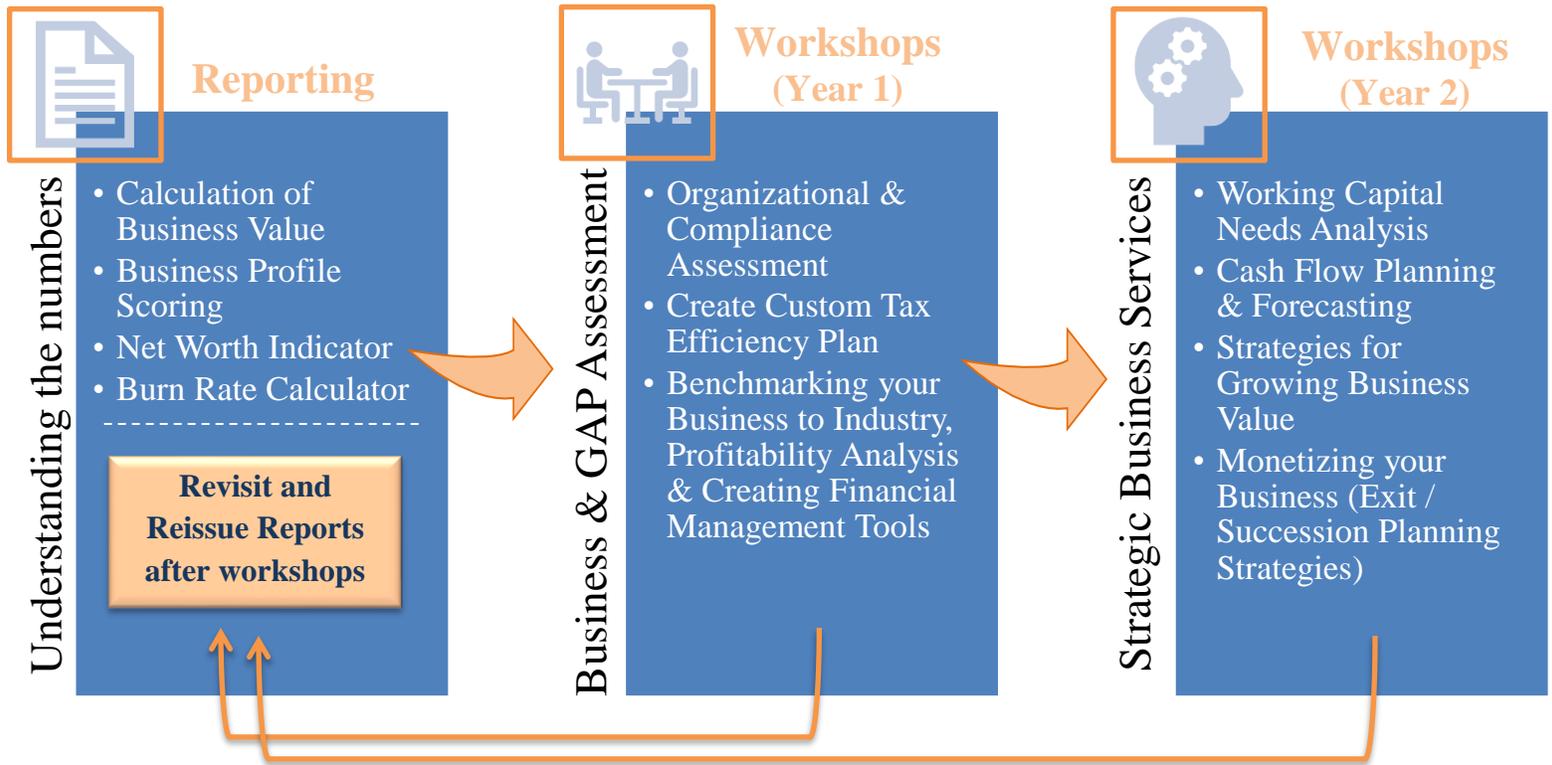


Academy Program

Valuation Based Strategic Planning



Our Academy Program – Partnering with SPM&Co

The Academy program – breaking the CPA mold & fueling client success. By joining the Academy, not only do we work with you to satisfy your regulatory compliance obligations (as the Academy incorporates all the benefits of the Advantage program), but we also foster a partnership that extends far beyond the confines of tax return deadlines and financial reporting requirements. It is as much about the engagement at hand as it is about maintaining a permanent partnership with our clients – a continuous journey to designed to help achieve a vibrant future for their company, their employees and themselves.

Who is this best suited for? For those clients who want more! More planning, more pro-action, more help with implementation of decisions, more guidance on what drives sales, income, cash flow, etc.

How does this work? We start by figuring out where you are and then through 1 on 1 workshops, we work with you to develop a great path forward to achieve your goals, to accelerate growth and provide forward-thinking information relative to your success. We work closely with you to ensure that effective reporting, accurate forecasting and sophisticated analyses are in-place and accessible to solve real business problems and drive better results.

Transparent information on both current and future financial performance, presented in a meaningful and concise manner, is the foundation upon which entrepreneurs engineer growth. With dynamic and forward-looking financial planning and analysis, modern enterprises can build and sustain decision-making cultures and fuel future growth.

The **Academy** provides the critical analysis and advisory needed to make smart business decisions and ensure your organization is in the most advantageous position strategically, financially and operationally.

Academy Workshops

Year 1 Workshops benchmark your business to its industry, review the businesses profitability and cash flow generating ability, create financial metrics and management tools - and set out to address many of the following items:

ORGANIZATIONAL SERVICES	COMPLIANCE SERVICES	TAX EFFICIENCY SERVICES
Analysis of Corporate Agreements Business Expense Analysis Accounting System Review Chart of Accounts Analysis Accounting System Clean Up Review Status of Corporate Books Risk Mitigation Analysis Entity Selection/Corporate Structure Business Plan Review	Tax Preparation and Filing: - Corporate - Personal - State Accounting & Bookkeeping Services Review of current payroll process/provider Payroll Services Annual Corporate Filing (State)	Create Custom Tax Efficiency Plan Capital Needs Analysis Personal/Corporate Tax Review Audit Risk Review Owner Compensation Strategy Accountable/Reimbursement Plan Review of Auto Expense Policy Fringe Benefit Analysis Self-Directed Retirement Plans Independent Contractor Vs. Employee Hiring Family Members Passive Income Rental Property Strategies Maximize Tax Credits

In year 2, the Workshops seek to establish and implement strategy.

Year 2 Workshops continue to build upon the work in year 1 – we continue our industry analysis and utilization of financial metrics and management tools and look to take a deep dive into many of the following items:

STRATEGIC FINANCIAL SERVICES	
Create Financial Management Tools Strategies for Growing Business Value Managing Debt/Leverage Profitability Analysis Balance Sheet Analysis and Strategies Review Succession/Exit Planning Strategies Monetizing Your Business	Review of Financial Management Tools Cash Flow Planning and Forecasting Working Capital Needs Analysis Support Acquisition of Financing Rent Vs. Buy Analysis Feasibility Studies Acquisition Due Diligence

At the end of each year, we revisit our business scorecard, reassess, determine our progress, recast the calculation of value and then make our plan for the coming year.