



Business Priority Analysis

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

