



Services Expansion Program

Financial Planning and Analysis

Financial Measurements Essentials

Course Description

Financial reporting is tough. You know that better than anyone. What reports should I be sending? What does the client expect? Are there some reports I should be charging more for? Business owners desperately need help, and building the perfect advisory report is really tough. You will receive the materials and tools to do everything listed below....and more!

Syllabus

Section One – Storytelling with Financial Data

- Define your role as an advisor
- What your client will pay more for
- What are the key metrics (KPI's) you should always start with?

Section Two – Building the Ideal Relationship

- The secret to the perfect client relationship
- Making yourself indispensable
- Managing client expectations

Section Three – Create the Perfect Deliverable

- Scaling your practice (like a boss)
- Building a reporting process that is actually sustainable
- The perfect deliverable

* No pre-requisite required.