



FREE
GUIDE

HOW TO BUILD YOUR

Financial Dream Team

www.taylormadebks.com

Welcome!

When it comes to your business finances, you can't do it *all* alone. To build a sustainable business, you need a team of trusted advisors on your side.

We're going to break down the roles of each of the members of your financial dream team and share a few people you may want to interview for your business!

DREAM TEAM OVERVIEW



CPA



BOOKKEEPER



BANKER



INSURANCE AGENT



ATTORNEY

Due diligence

Before trusting someone to be an advisor for you and your business, make sure to do your due diligence and ensure they're going to be a good fit!

DUE DILLIGENCE CHECKLIST

Ask about their experience serving businesses in your industry

Read reviews and ask your peers for their recommendations

Don't be afraid to interview multiple options and request quotes

Double-check their licensure and certifications

Carefully review their service contracts before signing

CPA/Accountant

Your CPA or tax accountant should be your go-to for tax preparation, planning, and compliance questions throughout the year.

Who do we recommend?

Rocco Tundo
www.marinuccicpa.com
Rocco@marinuccicpa.com
(301) 942-2266

Robin Hawn
www.baxtertaxiservice.com
baxtertaxis@twlakes.net
(931) 858-4611

Banker

Building a relationship with a banker can help you understand the account types and financing options available to optimally manage your business finances.

Who do we recommend?

Mandy Mathis
www.firsthorizon.com
msmathis@firsthorizon.com
(931) 528-2561

Bookkeeper

Your bookkeeper helps handle your day-to-day financial record-keeping. They make sure your income and expenses are accurately categorized and accounts are reconciled.

Who do we recommend?

Corrie Scott

www.taylormadebks.com
corrie@taylormadebks.com
(931) 644-2769

Rita Julian

www.julianbookkeeping.com
rita@julianbookkeeping.com

Insurance Agent

Working with an insurance agent who understands your industry can help make sure you have the appropriate types and levels of coverage.

Who do we recommend?

Grant

www.dekalbinsurance.net
grant@dekalbinsurance.net
(615) 597-0660

James Massengille

www.swallowsinsurance.com
jmassengille@swallowsinsurance.com

Want to learn more?



We're here to help when it comes to your
bookkeeping needs.

LINK IN BIO

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