

Financial Dream Team

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 dilligence

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.baxtertaxservice.com baxtertax@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?

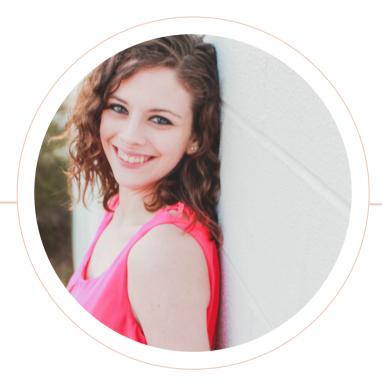
Grant

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

James Massengille

www.swallowsinsurance.com jmassengille@swallowsinsura nce.com

Want to learn more?



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

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