CLARK
& Associates, Inc.
Financial Solutions
Guiding Our Clients toward a Brighter Financial Future...
EST. 1987

BUSINESS ROADMAP

WE BUILD BUSINESSES TOGETHER WITH OUR CLIENTS

BuildingFreedomBook.com

CLARK FINANCIAL SOLUTIONS

BUSINESS ROADMAP

OUR PLAN. OUR PURPOSE. OUR FUTURE.

We help families and business owners build, protect, and transfer wealth so they can live brighter.

OUR PURPOSE

Empower financial confidence and Brighter tomorrows.

OUR CLIENTS

$2-5MM+households and business owners seeking clarity, strategy and partnership.

OUR DIFFERENCE

Holistic planning. Proactive advice. Exceptional service. Lasting relationships.

OUR VALUES

People First. Do the Right Thing. Grow Together. Make and Impact.

THE ROAD AHEAD

Q1

FOUNDATION

JAN - MAR

- Deepen client relationships and deliver exceptional experiences
- Optimize planning processes and technology
- Strengthen team skills and accountability
- Drive quarterly review and planning cadence

Q2

GROWTH

APR - JUN

- Expand marketing and referral engine
- Host high-impact events and webinars
- Grow center of influence partnerships
- Convert more ideal relationships into long-term clients

Q3

SCALE

JUL - SEP

- Enhance team capacity and leadership
- Refine systems for operational excellence
- Increase assets under management
- Deliver an extraordinary client experience at scale

Q4

ACCELERATE

OCT - DEC

- Execute strategic marketing push
- Maximize year-end planning opportunities
- Review results and celebrate wins
- Plan for an even stronger 2026 and beyond

CLARK FINANCIAL SOLUTIONS

BUSINESS STRUCTURE SNAPSHOT

Meeting Date: ______________________________

Business Name: ______________________________

Business Owner(s): ______________________________

Years in Business: ________________ ☐ LLC ☐ S-Corp ☐ Partnership ☐Sole Proprietor

Primary Goal: ______________________________

____

Current Biggest Challenge: ______________________________

____

1 Operating Agreement

Building the Foundation

☐ Operating Agreement
☐ Business Insurance
☐ Key Person Insurance
☐ Buy/Sell Agreement
☐ Employee Benefits

☐ Health	☐ Disability
☐ Dental	☐ Life
☐ Vision	☐ AD&D

☐ Other

2 Succession Planning

Protecting the Business

☐ Emergency / Death Plan
☐ Business Continuity Plan
☐ 3-Year Vision
☐ 5-Year Vision
☐ 10-Year Vision
☐ Transition / Buyout Strategy
☐ Estate Coordination
☐ Other

3 Profit First

Strengthening Cash Flow

☐ Read Profit First
☐ Cash Runway Tool
☐ Build 3+ Month Cash Reserve
☐ Quarterly Tax Planning
☐ Cash Flow Review
☐ Expense Optimization
☐ Banking Structure
☐ Other

4 Excess Flow of Cash

Growing Long-Term Wealth

☐ IUL Strategy
☐ Cash Balance Pension
☐ Defined Benefit Plan
☐ Executive Compensation
☐ Investment Strategy
☐ Retirement Planning
☐ Tax Reduction Strategies
☐ Business Expansion
☐ Real Estate Opportunities
☐ Other

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BUSINESS STRUCTURE SNAPSHOT

Personal Planning

Current Focus

- ☐ Retirement Planning
- ☐ Estate Planning
- ☐ Asset Protection
- ☐ Insurance Review
- ☐ Legacy Planning
- ☐ Charitable Giving
- ☐ Family Financial Planning

Notes:

More Tax & Business Planning

Future Opportunities

- ☐ Entity Review
- ☐ Tax Strategy
- ☐ Exit Planning
- ☐ Employee Benefits
- ☐ Executive Compensation
- ☐ Business Valuation
- ☐ Acquisition Planning
- ☐ Succession Strategy

Notes:

Priority Action Items

Next Steps

1

2

3