



# Business Owner Consulting Workshop Agenda

## San Mateo, CA Workshop

9:00am\*

### Registration & Distribution of Materials

9:30am **Risk Measurement:** What are the problems faced by small to medium sized business owners, including professional practitioners? What is the **true value** of the business and where is it headed? What type of succession plan is most appropriate and how can it be funded? Are there outdated or unfunded agreements? Is a succession plan trustee needed? How to structure presentations of these issues that includes a full information disclosure and credible calculations, displayed in both numerical and graphic format for maximum understanding.

10:45am

### Mid-Morning Break

11:00am **Business Planning Process:** a fully documented flowchart; outlines all the steps required to provide superior advice and service; 7 elements & 37 tasks; for use with clients and advisors.  
**Presentation to a business owner prospect;** use of the recommended charts, illustrations, materials, business planning process flowchart and business document archive case.  
**Business Valuation:** how to determine the true value of the business enterprise as an ongoing concern, including projected values for planning purposes.  
**Alternate Funding:** why cash won't work! How to transfer a business interest using discounted dollars. Business transfer options. Why a trustee is recommended.

12:45pm

### Luncheon

1:45pm **Business Loan Cancellation:** if the CEO or a principal is critically disabled or dies, how do lending institutions react and how can loan agreement default provisions be effectively addressed? Making the presentation to Business Owners and preparing the illustration.  
**Excel Calculations:** (furnished on thumbdrive) used in situation analysis:

- Performing the business valuation analysis; necessary for all succession plans.
- Performing the business interests funding alternatives; select the best option.
- Excel spreadsheet; explanation of the data input and impact on values.
- Produce a business loan repayment analysis; changes in interest rate or amortization.
- Editing and adjusting the illustrations of risk and reward; solving the estate problems.
- Prospect data for your sample case analysis

3:00pm

### Mid-Afternoon Break

3:15pm **Preparation of Strategic Business Plan** for clients using workshop materials.  
Assembling client reports, plans, presentations, agendas and consultant action checklists.  
Monitoring the implementation, revising business values and funding for established clients.  
**Five Case Studies** adapt your thinking mode to that of the business owner to identify their problems, gather facts, perform the numerical analysis and make recommendations.

4:45pm Review of the articles, agendas, schedules and checklists.  
Why and how you must edit the Word, PowerPoint and Excel files that are furnished.  
Conducting the Introduction Interview and Business Report Delivery presentations.  
Quick review of the workshop materials, print and electronic by all participants.  
Use of the **Post-Workshop Action Checklist**. Why we suggest one-half day per week.

5:30pm

### End of the Workshop

\* Times are PST

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