

Annual Planning Workshop



Build a financial plan that can serve as a roadmap to help you reach your goals!

Join ABC for this informative program designed for senior decision-makers and key team players who manage their company's financial risk.

I. Overview of Key Planning Considerations

- Demonstrate knowledge of the seven critical functions for every business, and self-diagnose areas for improvement
- Remember key lessons from prior sessions
- Outline relevant end-of-year financial considerations
- Identify best practices for annual goalsetting & achievement plans

II. Breakout Session – Annual Planning & Implementation

- Visualize where you want your business to be in the next three to five years and compile a list of activities that need to be prioritized to get there (Long-Term Goals)
- Choose which activities you will be focusing on next year to move you towards your long-term vision (Mid-Term Goals)
- Dissect annual activities into quarterly milestones that can be used to track and measure progress (Short-Term Goals)
- List the specific tasks that must be completed, in order, to reach each milestone and how they will be tracked (Deliverables)



Presenter: Mr. Jeffrey George, CFA, CEPA, Founder and Principal, TAO Financial
Jeff is an accomplished financial professional with knowledge and experience in a variety of disciplines including accounting, investment banking, institutional investment consulting, private wealth management, financial planning, and business owner exit planning. During his tenure at JPMorgan Investment Bank, Jeff worked with offices worldwide managing the risks associated with billions of dollars of complex investments.

As an investment consultant, Jeff advised on \$2 billion in corporate and retirement plan assets in plans such as 401(k)s, pensions, executive deferred compensation plans, executive pension plans, and corporate-owned variable life insurance products.

Scan the QR code or register online at abccentralfloida.com/training-development/education-calendar/

Who Should Attend

- Owners & CEOs
- CFO & COO
- Account Executives
- Account Managers

REGISTRATION

Date	January 26, 2023
Time	8:30 AM - 11:30 AM Includes materials and handouts, continental breakfast refreshments
Location	651 Danville Drive, Suite 200 Orlando, FL 32825
Cost	\$250 ABC Members \$350 Non-Members

Because of the intensity of the workshop content, seating will be limited to 25 and it is suggested that key decision-makers register with a core team who deal with financial planning for their organizations.

Inquire about sponsorship opportunities.



Connect... Educate... Advocate

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