

FINANCIAL MANAGEMENT FOUNDATIONS

April 20, 2023
8:30 AM – 11:30 AM
ABC, 651 Danville Drive,
Orlando, FL 32825

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

- Outline core financial activities related to your business operations.
- Describe Core Financial Roles and Relationships critical to your business, both internal and external.
- Identify most used financial reports, their components, and their purpose.
- Recognize the relationship between financial statements and how they flow together.
- Discuss unique financial reporting requirements for the construction industry.
- Distinguish between various financial relationships, their importance, and considerations for selecting the right partner.
- Explain how financial reports can be used to monitor your business's health. Assess the relevance of each core financial activity and role as it relates to your business.
- Figure out your business' opportunities for enhancing core financial operations and reporting activities.
- Determine whether your business is subject to unique reporting requirements, and which would apply.



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.

WHO SHOULD ATTEND

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

COST & CANCELLATION POLICY

ABC Member - \$149
Non member - \$199

A cancellation number will be issued for requests that are received by 5 p.m. on April 19, 2023. Any requests for a refund made after this date will not be processed.



**Scan QR code to
register today**

Call 407.628.2070 or email training@abccf.org