



AMBITIOUS  
*management*



FREE  
GUIDE

HOW TO BUILD YOUR

# Financial *Dream Team*

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# 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



ACCOUNTANT



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

# Want to learn more?



We're here to help when it comes to understanding taxes, payroll, bookkeeping, insurance, and funding for your business!

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