



Maximize performance. Optimize results.

BAIL (Banking, Accounting, Insurance & Legal) Services **Get the most from your banker, accountant, insurance broker & attorney**

What is it?

A consulting service for business owners that focuses on coordinating the professional services that owners of small businesses routinely use:

- Banker
- CPA
- Insurance Agent and Investment Advisor
- Attorney

How does it work?

The BAIL service reviews how you utilize professional services and brings your service professionals together in a coordinated effort to further your business plan, while taking care not to disturb your relationships with the service professionals.

BAIL evaluates and improves how you utilize your...

- **Bankers:** Investing, borrowing, managing & moving your funds
- **Accountant:** Bookkeeping, financial reporting, tax planning & tax return preparation
- **Insurance Agent:** Coordinating business/personal needs & opportunities
- **Investment Advisor:** Coordinating business/personal needs & opportunities
- **Attorney:** Managing risk, reviewing large transactions, avoiding conflicts, & crafting solutions

How does the client benefit?

You receive coordinated professional services oriented specifically to support your business plan to optimize your current and future business effectiveness.