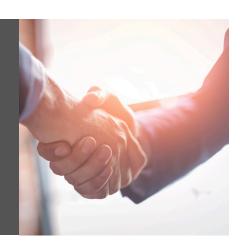


Scope of Service

A summary of services provided to your agency within the selected service plan.



Advisor Service Summary

Service Tier	Advisor
Consultant	Colby Allen, MBA, ARM, AIDA, CXAP
Service Location	Remote/virtual via video conferencing
Service Duration	Monthly recurring
Service Fees	To be determined after needs discovery call
Service Deliverables	Monthly meetings, client portal with written resources, bi-monthly agency doc or resource reviews
Start Date:	Onboarding begins immediate upon agreement execution. Monthly recurring begins the first of the month following successful completion of onboarding.

Advisor Service Objectives

The Advisor Service is intended for agencies that are seeking guidance or mentorship on setting and achieving growth goals. This is accomplished by:

- 1. Learning the history of the agency and current ownership's vision, mission, and values.
- 2. Establish owner benefit goals for growth, exit planning, or other values that stakeholders can support through their ownership in the agency.
- 3. Establish financial goals and KPI targets which are ordered towards owner value goals.
- 4. Establish operational goals which drive the achievement of financial goals within the agency's plan.
- 5. Provide regular cadence of planning, accountability, and guidance on agency's established goals and performance toward achieving objectives.

Advisor Service Scope

The Advisor Service provides a holistic onboarding experience to gather important information about the agency, a robust historical financial analysis, as well as orientation with the agency's staffing and organizational structure. Once the initial orientation is complete we go through a goal setting workshop designed to enable the agency owner to establish a clear vision on executable projects ordered to achieve their personal and professional goals.

Service Deliverables

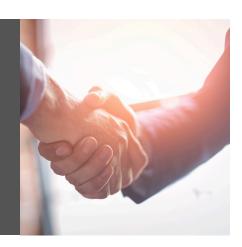
Item #1	Onboarding	Target Date	Completed
	Orientation of Client Portal		
0	Data Collection and Historical Analysis		
0	Goal Setting Workshop		
0	Goal and Value Tracking Resources		
Item #2	Monthly Recurring Meetings	Target Date	Completed
Item #2	Monthly Recurring Meetings Schedule Day/Time for Regular Meetings	Target Date	Completed
_		Target Date	Completed
_	Schedule Day/Time for Regular Meetings	Target Date Target Date	Completed
0	Schedule Day/Time for Regular Meetings Schedule Mid-Month Touchpoints		





Scope of Service

A summary of services provided to your agency within the selected service plan.



Executive Service Summary

Service Tier	Executive CFO
Consultant	Colby Allen, MBA, ARM, AIDA, CXAP
Service Location	Remote/virtual via video conferencing
Service Duration	Monthly recurring
Service Fees	To be determined after needs discovery call
Service Deliverables	Monthly meetings, client portal, financial planning resources, monthly executive report, scheduled operational analyses, annual company report
Start Date:	Onboarding begins immediate upon agreement execution. Monthly recurring begins the first of the month following successful completion of onboarding.

Executive Service Objectives

The Executive CFO Service is intended for agencies that are seeking active guidance on setting and achieving growth goals utilizing proactive financial planning, analysis, and strategic planning to de-risk the agency and accelerate value. This is accomplished by:

- 1. Learning the history of the agency and current ownership's vision, mission, and values.
- 2. Establish owner benefit goals for growth, exit planning, or other values that stakeholders can support through their ownership in the agency.
- 3. Establish financial goals and KPI targets which are ordered towards owner value goals.
- 4. Establish operational goals which drive the achievement of financial goals within the agency's plan.
- 5. Provide regular cadence of planning, accountability, executive financial reporting, and guidance on agency's established goals and performance toward achieving objectives.

Executive Service Scope

The Executive CFO Service provides a holistic onboarding experience to gather important information about the agency, a robust historical financial analysis, as well as orientation with the agency's staffing and organizational structure. Once the initial orientation is complete we establish a cadence of implementing projects and executive reporting to follow a charted value map intended to accelerate enterprise value and achieve goals for stakeholders.

Service Deliverables

Item #1	Onboarding	Target Date	Completed
0	Orientation of Client Portal		
0	Data Collection and Historical Analysis		
0	Goal Setting Workshop		
0	Establish Agency Budget and Forecasts		
0	Design Agency KPI/OKR Dashboard		
Item #2	Monthly Recurring Meetings	Target Date	Completed
0	Schedule Day/Time for Regular Meetings		
	Schedule Mid-Month Touchpoints		
Item #3	Schedule Mid-Month Touchpoints Scheduled Analyses/Projects	Target Date	Completed
		Target Date	Completed
Item #3	Scheduled Analyses/Projects	Target Date	Completed
Item #3	Scheduled Analyses/Projects Valuation	Target Date	Completed
Item #3	Scheduled Analyses/Projects Valuation Book of Business Analysis and Planning	Target Date	Completed

