



# PARAGON BUSINESS EDUCATION SERVICES

WHERE EDUCATION MEETS EXPERIENCE  
AND KNOWLEDGE DRIVES SUCCESS

## Agenda

**8:00 am – 8:45 am Registration, Breakfast, and Networking**

**8:45 am – 9:00 am Opening Remarks Keynote Speaker**

**9:00 am – 9:50 am Business Set-up and Structure Speakers John Brooks and Patricia Porter**

**9:50 am -10:00 am Coffee Break**

**10:00 am – 10:50 am Business Contracts - Speaker John Brooks**

**11:00 am – 11:50 am Taxes – Speaker Patricia Porter**

**12:00 pm – 1:00 pm Lunch Sponsors Information and Thanks!**

**1:00 pm – 1:50 pm Marketing – Bethanie Hornbeck**

**1:50 pm – 2:00 pm Afternoon Break**

**2:00 pm – 2:50 pm – Fraud Risk and Prevention Patricia Porter**

**2:50 pm – 3:30 pm – Tying it all together**

**3:30 pm Questions, Closing Remarks**



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## **Annotated Agenda**

**8:00 am – 8:45 am Registration, Breakfast, and Networking**

**8:45 am – 9:00 am Opening Remarks Keynote Speaker**

Keynote Speaker to be determined will address the group

**9:00 am – 9:50 am Business Set-up and Structure Speakers John Brooks and Patricia Porter**

### **Choosing the Right Business Structure**

- Sole Proprietorship
- Partnership (General & Limited)
- Limited Liability Company (LLC)
- S-Corporation vs. C-Corporation
- Nonprofit vs. For-Profit Entities
- Hybrid Models (like B Corps or Social Enterprises)

### **Legal Formation Steps**

- Registering with the state (Articles of Organization/Incorporation)
- Choosing and registering a business name
- Getting an Employer Identification Number (EIN) from the IRS
- Understanding business licenses and permits
- Setting up a business bank account

### **Operating Agreements & Governance**

- LLC Operating Agreements
- Partnership Agreements
- Corporate Bylaws
- Roles & responsibilities of owners, members, or shareholders
- Registered agent requirements

### **Liability Protection & Risk**

- Personal liability vs. limited liability
- Insurance needs (general liability, professional, etc.)
- Legal separation between personal and business finances



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## **Tax Considerations by Entity Type**

- Pass-through taxation vs. double taxation
- Self-employment tax
- Electing S-Corp status for an LLC (Form 2553)

## **Business Naming & Branding**

- Legal name vs. “Doing Business As” (DBA)
- Trademark search and protection
- Domain names and brand consistency

## **Recordkeeping & Compliance**

- Annual reports and renewal fees (state-specific)
- Required meetings or documentation (e.g., corporate minutes)
- Business licenses and zoning compliance

## **Start-Up Financial Setup**

- Initial capital contributions or funding
- Setting up accounting software/systems
- Creating a basic budget and forecasting

## **Growth Considerations**

- Scalability of your chosen structure
- Bringing on partners, investors, or board members
- Converting or restructuring later (e.g., from sole prop to LLC)

## **Professional Support**

- When to involve a CPA, attorney, or business advisor
- Local small business resources (SBA, SBDC, etc.)
- Ongoing education and mentorship

**9:50 am -10:00 am Coffee Break**

**10:00 am – 10:50 am Business Contracts - Speaker John Brooks**

## **The Purpose of Contracts in Business**

- Why contracts matter — protection, clarity, enforceability
- Verbal vs. written agreements
- What makes a contract legally binding?



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## Essential Elements of a Valid Contract

- Offer, acceptance, and consideration
- Legal purpose and capacity
- Mutual consent and clarity of terms

## Types of Contracts Businesses Commonly Use

- Service agreements
- Independent contractor agreements
- Partnership agreements
- Non-disclosure agreements (NDAs)
- Employment contracts
- Vendor/supplier agreements
- Lease and rental agreements
- Sales and purchase contracts

## Understanding Key Clauses

- Payment terms and invoicing
- Scope of work or deliverables
- Termination and cancellation clauses
- Dispute resolution (mediation, arbitration, jurisdiction)
- Confidentiality and non-compete
- Indemnification and liability
- Intellectual property ownership

## Common Contract Mistakes to Avoid

- Not having a written contract
- Using templates without legal review
- Vague or missing terms
- Failing to define responsibilities clearly
- Overlooking termination clauses or renewals

## Red Flags to Watch For in Contracts

- Unilateral clauses favoring the other party
- Automatic renewals without notice
- Undefined deadlines or open-ended commitments
- Personal guarantees



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## **Negotiating Contracts Confidently**

- How to read a contract before signing
- Questions to ask before agreeing
- Negotiating terms without burning bridges

## **Contracts and Legal Risk**

- Enforceability in court
- Breach of contract and remedies
- Statute of limitations on contracts

## **Digital Contracts & E-Signatures**

- Are electronic agreements enforceable?
- Platforms and best practices for digital signatures

## **When to Call an Attorney**

- Drafting or reviewing major contracts
- Entering a partnership or joint venture
- Contract disputes or enforcement issues

## **11:00 am – 11:50 am Taxes – Speaker Patricia Porter**

### **Business Structure & Tax Implications**

- Sole Proprietor, LLC, S-Corp, C-Corp
- Pass-through taxation vs. corporate taxation
- Self-employment tax obligations

### **Estimated Taxes**

- Quarterly estimated tax payments
- Avoiding penalties for underpayment
- Planning for due dates and cash flow

### **Payroll Taxes**

- Employer responsibilities (FICA, FUTA, State Unemployment)
- Employee vs. independent contractor rules
- Filing payroll forms (e.g., 941, W-2, W-3)

### **Sales & Use Tax**

- Understanding sales tax requirements
- Determining nexus (physical & economic)
- Use tax obligations for out-of-state purchases



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## **Deductions & Credits**

- Deductible business expenses (meals, travel, home office, etc.)
- Depreciation & Section 179
- Available business tax credits

## **Recordkeeping & Documentation**

- What to track and how long to keep it
- Using accounting software effectively
- Being audit-ready

## **Filing Requirements**

- Federal tax forms (1120, 1065, Schedule C, etc.)
- State and local business filings
- Issuing 1099s to contractors

## **Specialized Taxes**

- Franchise taxes in certain states
- Excise taxes (fuel, alcohol, etc.)
- Industry-specific obligations

## **Tax Planning**

- Timing income and expenses strategically
- Retirement contributions and benefits
- Proactive planning with your accountant

## **IRS & State Correspondence**

- Responding to IRS letters
- Amending returns
- Understanding taxpayer rights

**12:00 pm – 1:00 pm Lunch – Sponsors Information Thanks!**

**1:00 pm – 1:50 pm Marketing – Bethanie Hornbeck**

## **Welcome & Business Landscape Icebreaker**

- Quick intro: “What is your industry?”
- Mention the challenge: “If you’re not on Page 1, you don’t exist to your ideal customer.”



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## How Search Engines Work

- Breakdown of how Google ranks local business websites
- The “Money Pages” that matter: Home, Services, Contact
- Difference between Local SEO (map pack) vs. Organic (web) vs. PPC (ads)
- How potential clients search: high intent, urgency, local focus

**Visual Aid:** Heatmap or search journey for “accident lawyer near me”

## Local SEO Essentials

- Optimizing your Google Business Profile (GBP): categories, reviews, service areas
- Importance of consistent NAP (Name, Address, Phone) and local citations
- How reviews impact trust and ranking—plus ethical ways to request them
- Common GBP mistakes (like having multiple listings or location overlaps)

**Pro Tip:** Show an accounting firm not in the map pack vs. one that is

## Using Google Ads to Target High-Intent Leads

- Why PPC works when done right (and how it goes wrong fast)
- Geo-targeting, keyword strategy, and avoiding broad-match traps
- Ad extensions that work (callouts, location, sitelinks)
- Pairing SEO + PPC to own more real estate in search results

**Mini Demo:** Live example of a local company search showing paid + organic results

## Action Plan: What to Focus On Next

- “Quick Win” Checklist
  - Claim + optimize GBP
  - Add 5+ local keywords to your website
  - Set up call tracking
  - Run a branded keyword Google Ad
  - Request 3 new Google reviews this week

## Live Q&A + CTA

- Invite questions: “What’s working (or not) in your current marketing?”
- Offer: **Complimentary Visibility Audit** or 30-minute strategy call
- Share: Booking link and handout (Checklist and “5 Marketing Fixes to Get Your Business More Clients in 30 Days”)
  - Handout: Checklist
  - Handout: “5 Marketing Fixes to Get Your Business More Clients in 30 Days”
  - Slide deck
  - Link to book audit/consultation

**1:50 pm – 2:00 pm Afternoon Break**

**2:00 pm – 2:50 pm – Ethics in Business Fraud Risk and Prevention Patricia Porter**



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## Why Small Businesses Are Targets

- Lack of internal controls or segregation of duties
- Trust-based environments
- Limited oversight and staff wearing multiple hats

## Common Types of Small Business Fraud

- Payroll fraud
- Fake vendors or billing schemes
- Expense reimbursement abuse
- Cash theft or skimming
- Identity theft or business email compromise
- Grant or contract fraud (for nonprofits or public funds)

## Warning Signs of Internal Fraud

- Employees who refuse to take time off
- Unusual vendor relationships
- Lifestyle that doesn't match income
- Missing or altered documentation

## Protecting Your Business

- Establishing checks and balances (even for small teams)
- Reconciling bank accounts monthly
- Reviewing payroll and vendor lists regularly
- Having written policies and a code of ethics

## Understanding Business Ethics

- Ethics vs. legality: doing what's right, not just what's allowed
- Ethical leadership as a deterrent to fraud
- Modeling integrity at every level of the business
- Conflicts of interest and transparency

## Technology & Cybersecurity

- Phishing and scam emails
- Secure passwords and 2FA
- Protecting financial systems and customer data

## Building a Culture of Accountability

- Encouraging ethical behavior
- Having a safe way to report concerns (hotline, third party, etc.)
- Documenting and investigating complaints



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## **Establishing an Ethical Culture**

- Creating and enforcing a code of ethics
- Training staff on ethical decision-making
- Encouraging openness and accountability
- Zero tolerance for retaliation when raising concerns

## **What To Do If You Suspect Fraud**

- Don't confront — document
- Contact legal/accounting professionals
- Preserve evidence
- Report it

## **Encouraging Whistleblowing the Right Way**

- Create safe, anonymous ways to report
- Assure protection from retaliation
- Investigate all concerns consistently and fairly

**2:50 pm – 3:30 pm – Questions, Closing Remarks**