

FIREd by 50 Program Development Checklist

- ☐ What existing providers can “do better”? What’s their review date?
 - CPA: Numbers vs. Advice
 - Insurance: Price vs. Proactivity
 - 401(k): Enrollment Day vs. Education
 - Medical: Same as above
- ☐ Fractional Help – What’s the ROI for you?
 - HR
 - Sales
 - Leadership Team Decision Making
- ☐ Technology
 - Procore: Are you engaging them? They can help with frontline communication.
 - Other Tech Stacks: Same question. I.E. Your security provider can give you access to frontline issues. Have they explained that? Or are they just talking about theft?

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