



TELL ME WHAT'S GOING...

What to Bring (or Be Ready to Discuss)

1. Your Biggest Financial Pain Point

- What keeps you up at night?
- Is it cash flow? Tax exposure? Unclear financial reporting? Lack of strategy?

2. Your Business Snapshot

- What does your company do?
- How long have you been in operation?
- Annual revenue range (even approximate)?
- Team size (if applicable)?

3. Your Numbers (Optional but Helpful)

- Latest financial statements (P&L, Balance Sheet)
- Recent tax returns (business or personal, if relevant)
- Budget or forecast (if one exists)

4. What You Want Most

- Clarity? Efficiency? Tax savings? Peace of mind?
- What would a win look like in 90 days? In 12 months?

5. Decision-Making Authority

- Will you be the one implementing the strategy?
- Are others involved in approving services or recommendations?

Please email form to nikki@financenavig8tor.com or upload when you submit your name and email in the Contact us (Get in touch) section.

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