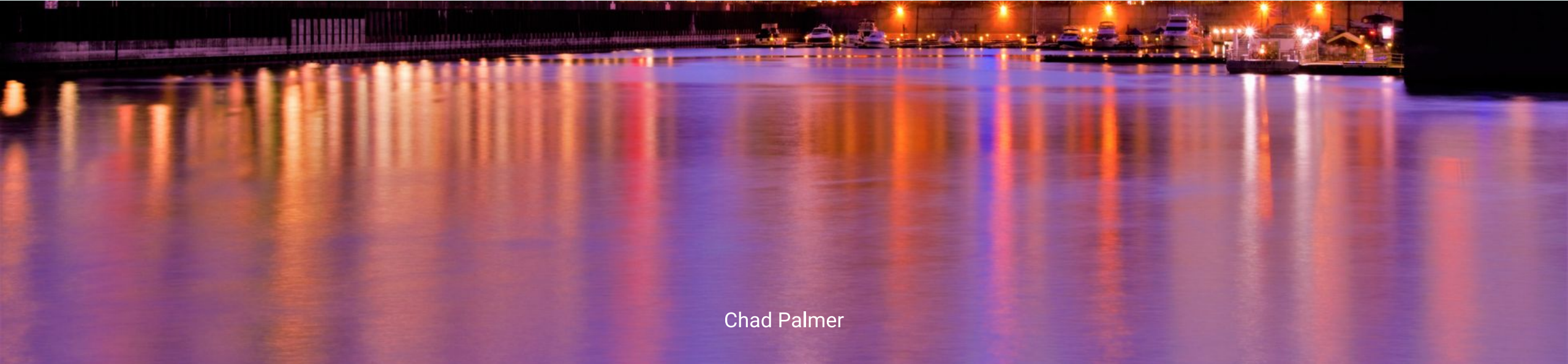




FINANCIAL AGENCY : BUSINESS PLAN



Chad Palmer

EXECUTIVE SUMMARY



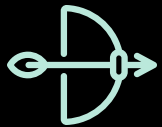
Overview of Business



Description of Services



Goals for the Business



Target Market



Competition & Why we are Different



Financial Outlook and Marketing Plan



EXECUTIVE SUMMARY

Mission

Our mission is to educate our young generation about wealth management, reach families to achieve financial freedom and assist the elderly to reach security. Through integrity and transparency, our goal is to build generational wealth for all people.

Market

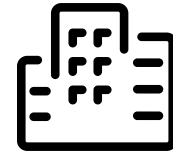
My target market are young adults 20's and 30's, to married couples, families and elderly. I will serve homeowners, entrepreneurs and small business owners. My goal is to assist in educating those that do not know about finances and wealth management.

Financial

I am able to gain financial freedom and independence. This opportunity has created within me a new dream...the dare to dream. Through persistence and dedication, I am able to finally envision a future that seemed so far away once.

Team

Bringing together a team that shares core values, that desires to walk this journey together is one of my goals. Knowledge is to be shared and success to be achieved together. For us, we shall break bread together and eat together as a family.



BUSINESS OVERVIEW

SECTION 1

MY BUSINESS IS TO WORK WITH YOUNG ADULTS, FAMILIES AND BUSINESS OWNERS TO EDUCATE AND ASSIST IN BUILDING AND MANAGING THEIR FINANCES AND WEALTH.

COMPANY DESCRIPTION

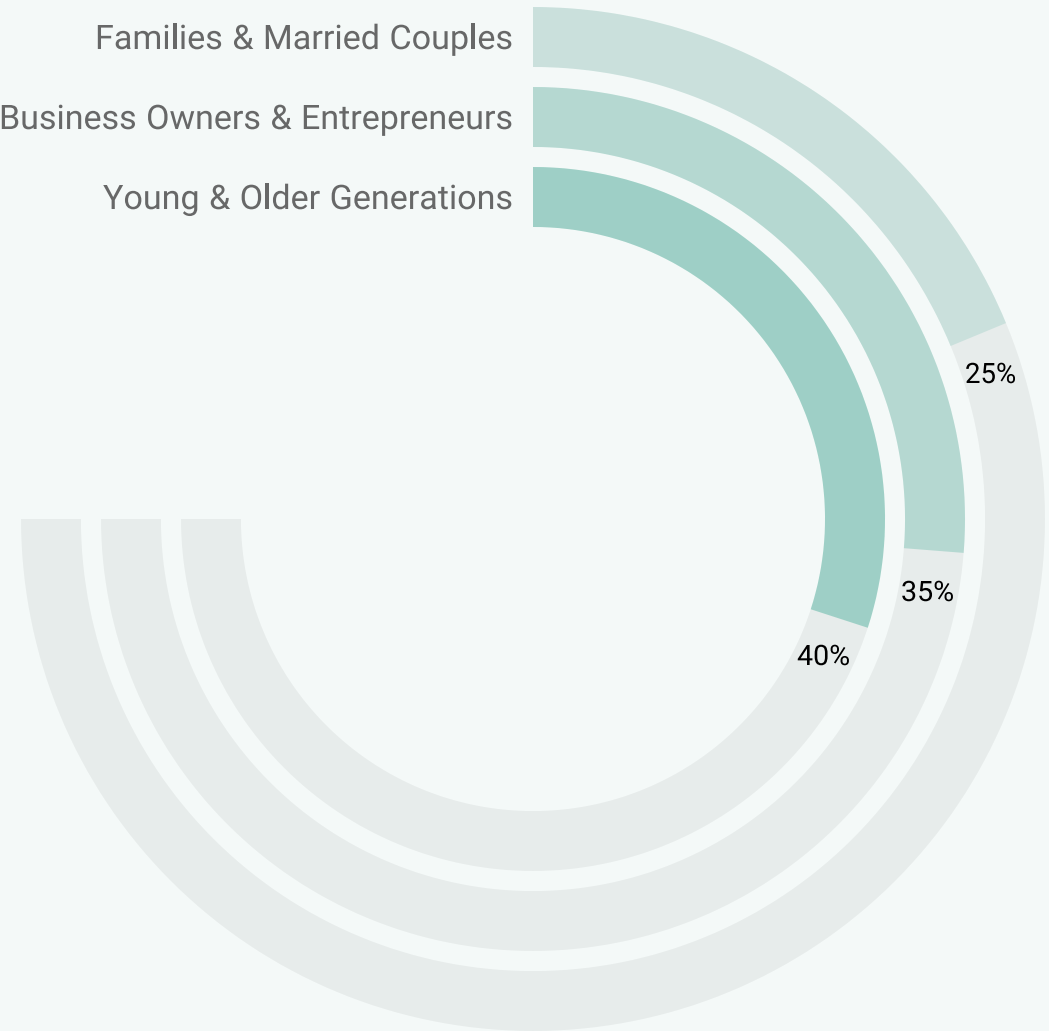


To reach and educate, serve and assist our communities build generational wealth and manage their finances to reach freedom.

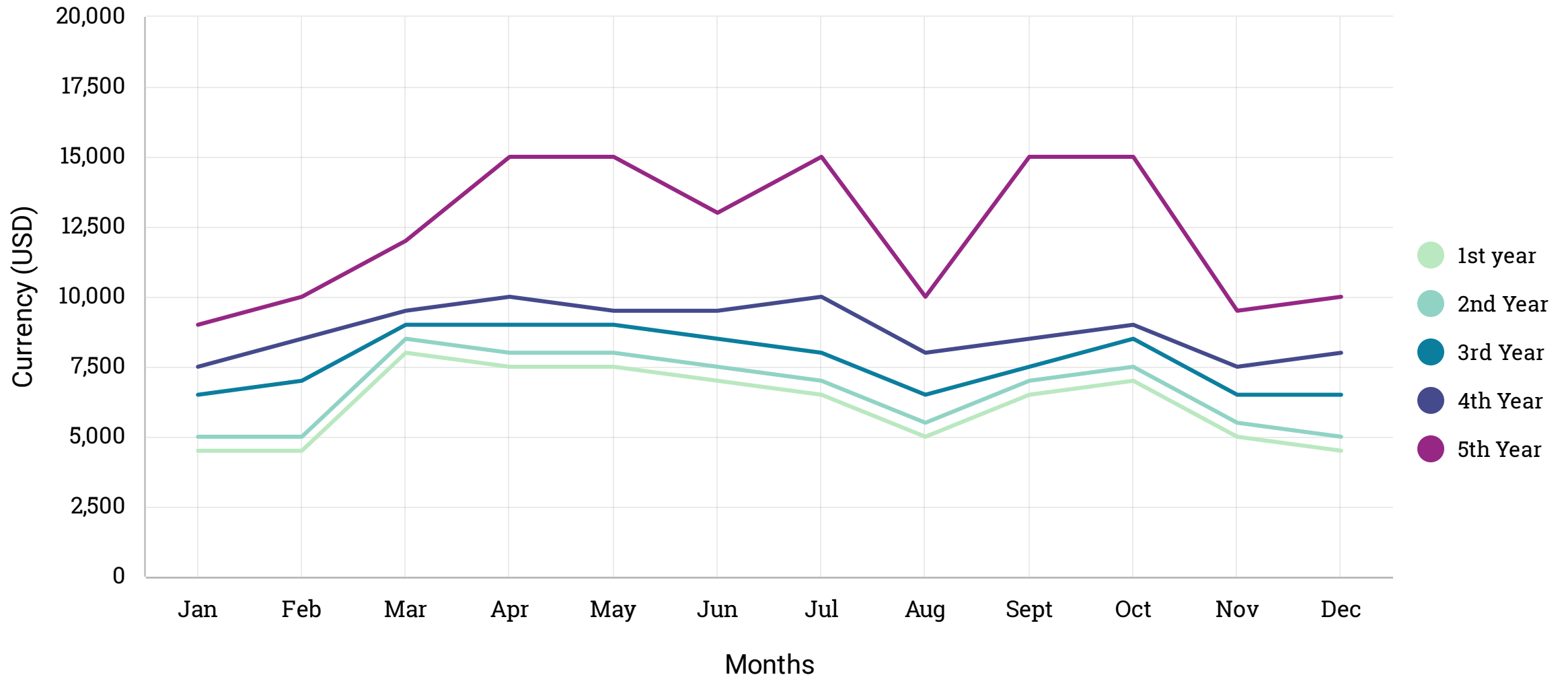


My vision is to share my testimony with our younger generation to begin building wealth. My vision is to take families on a journey to financial freedom and lastly, to cater to our elderly, to ensure security and comfort. My vision is to make a change in this world and redefine wealth as achievable.

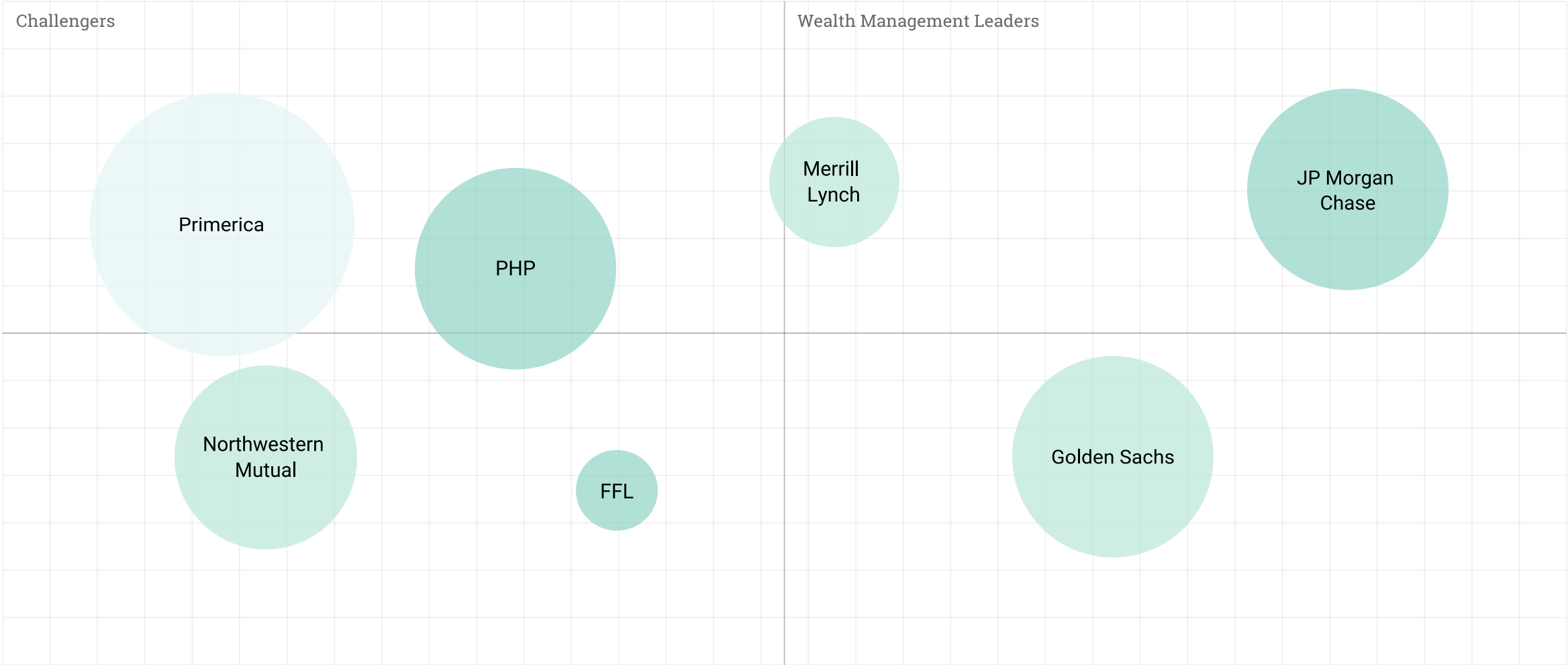
TARGET MARKET GOAL



MY GOALS PROJECTIONS 2022-2027



COMPETITIVE ANALYSIS



SWOT ANALYSIS

Strengths

Transparency, Strong Educational Programs, Affordable/Competitive, Authentic, Relatable

Weaknesses

Lacking Representatives due to exponential growth, Bilingual Needs

Opportunities

Knowledge in Finances, Business opportunities, Build Wealth, Financial Independence, Impact Lives, Help Businesses

Threats

Competing with other wealth management and finance companies



SECTION 2

SERVICES



SERVICES

We provide the following main services but not limited to:

1/ Wealth Management

Provide financial advice (independence number), building generational wealth, family planning, business planning

2/ Life Insurance & Retirement Planning

Assist in finding the best plan for you and your loved ones

3/ Debt Management

Analyze and connect clients to help manage debt and achieve financial freedom



SECTION 3

MARKETING PLAN



MARKETING TACTICS & GOALS

Strength in Social Media Platforms &
Reaching Needed Followers

Build E-Mail Listing with Monthly Marketing Flyers

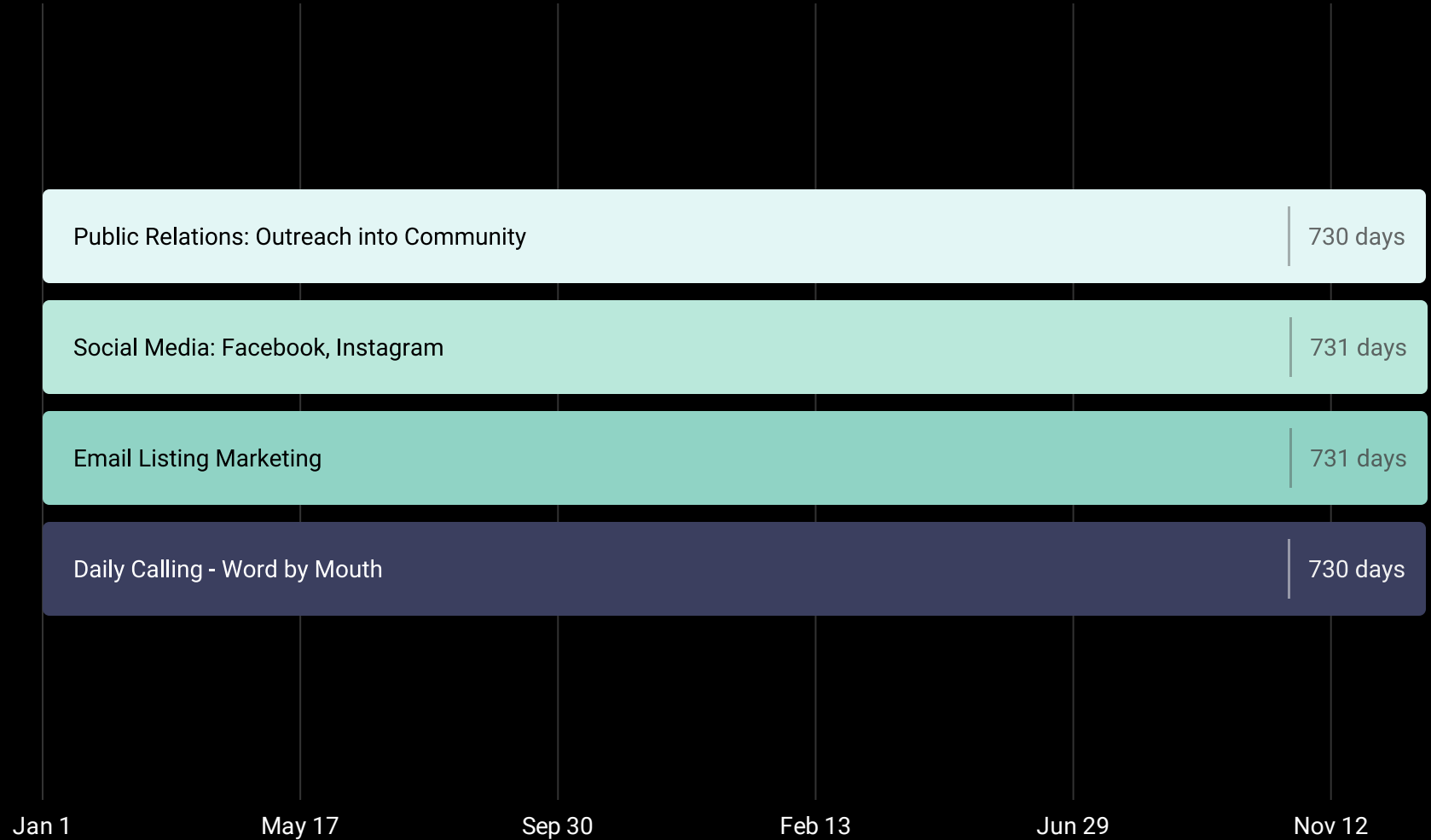
Reputation via "Word of Mouth"

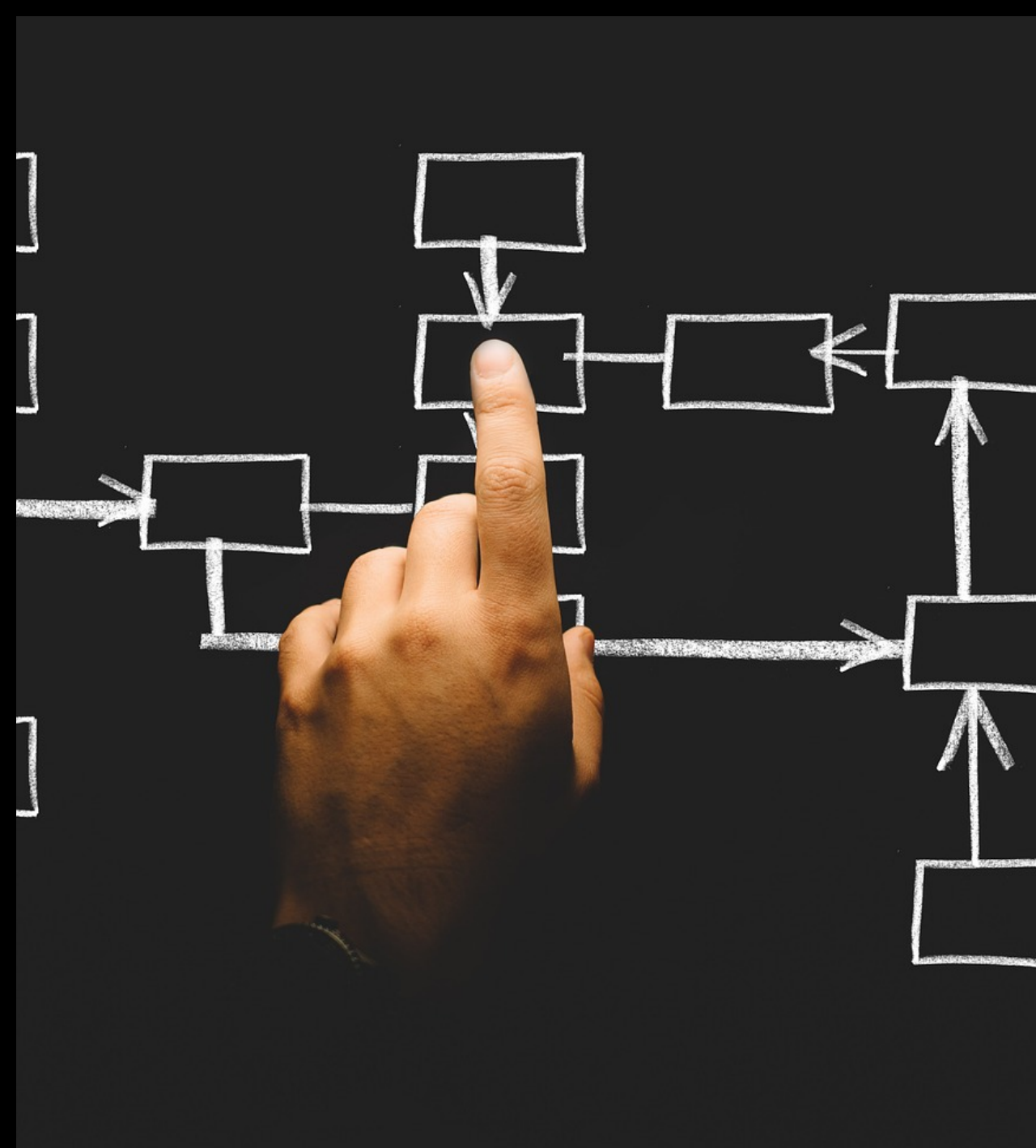


REACH AS MANY PEOPLE
AS POSSIBLE!!!!

MARKETING PLAN

2022-2023

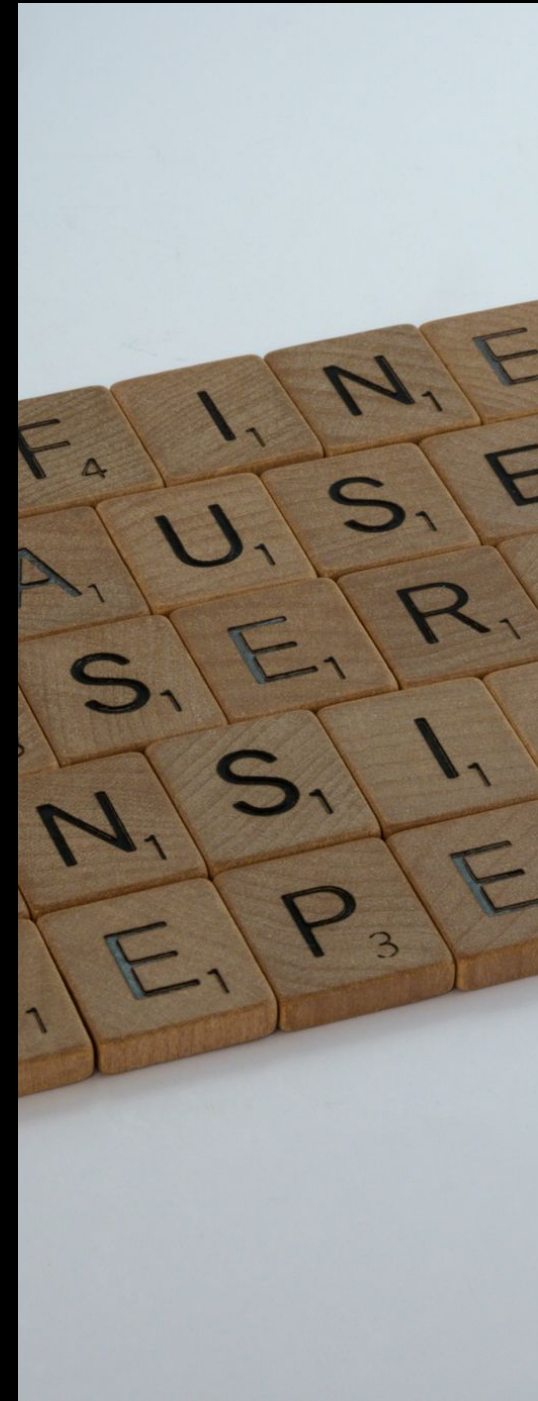
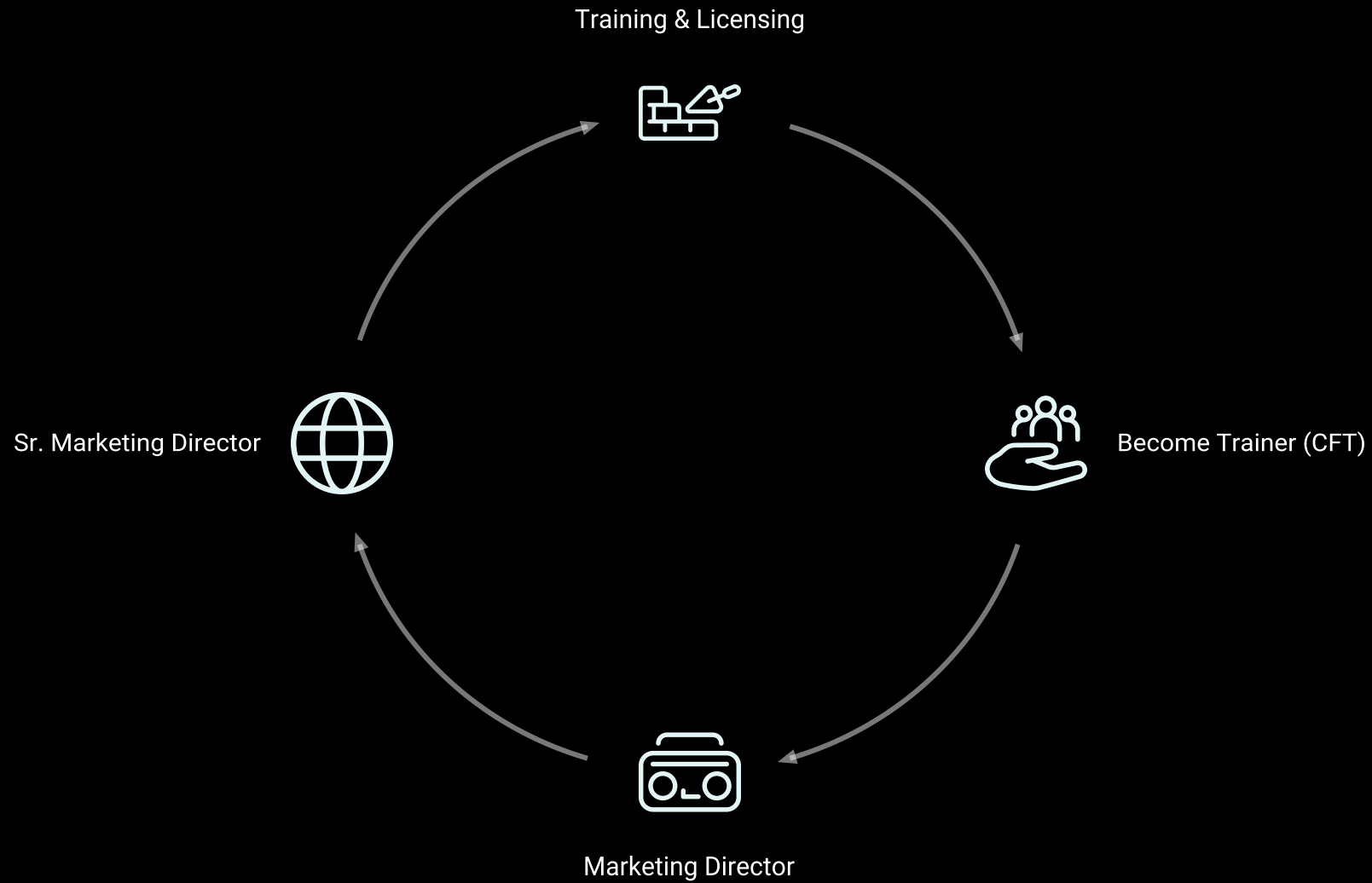




SECTION 4

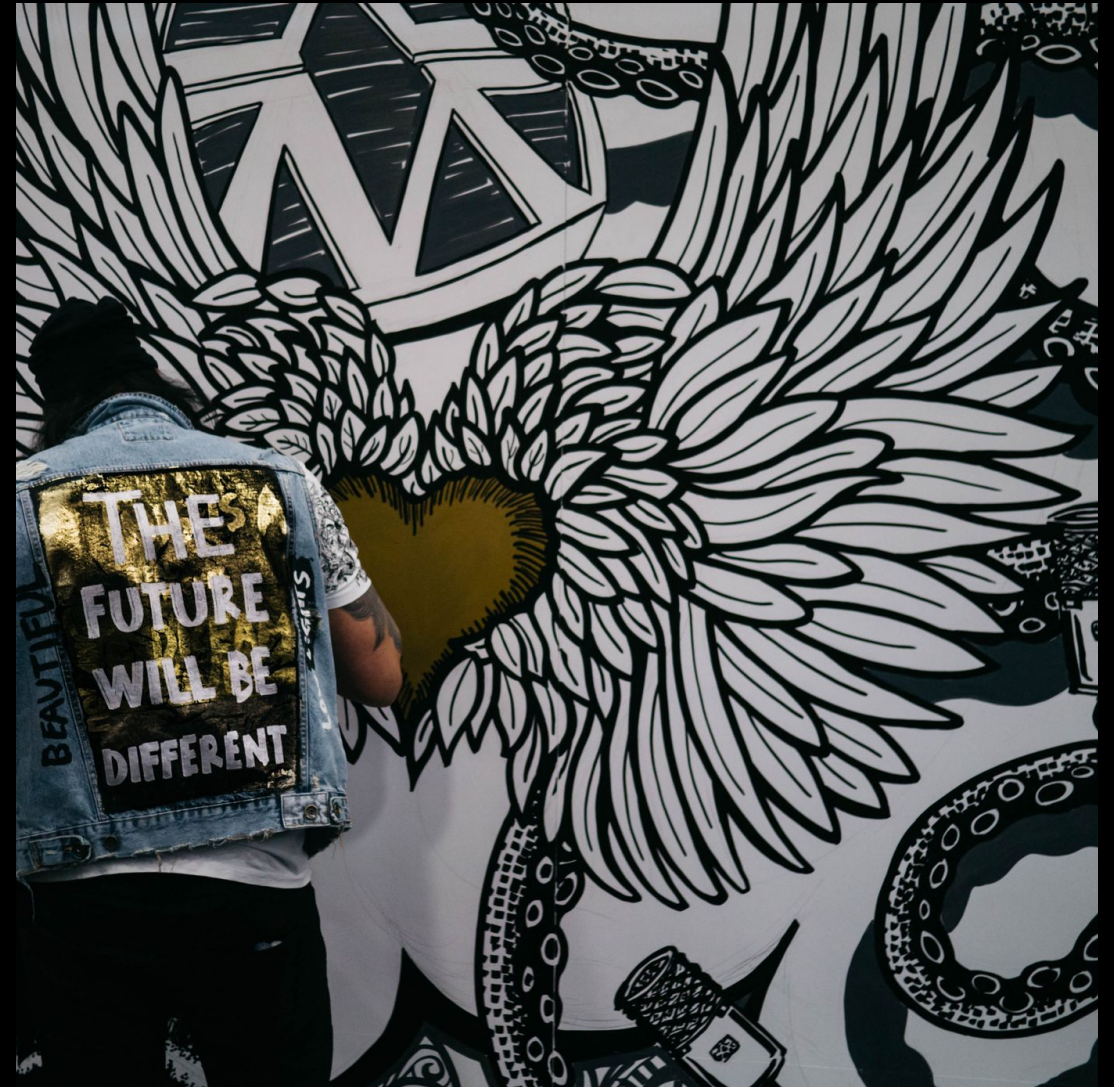
OPERATIONAL PLAN

MY PROCESS:



WHY ARE WE UNIQUE?

Diverse and connected, non-captive (independent) and affordable, we work with and have access to the top leading 160 companies in America. Therefore, our company ONLY works with A rated corporations that are the best in their field; which creates a very knowledgeable foundation. We believe that education is essential to change; therefore, we approach everyone by teaching them everything we know.



MY GOALS:

- *Financial Freedom for all of my Family Members
- *Own 2-3 businesses
- *Build Wealth and Financial Awareness
- *First Family Vacation for my Family and In-Laws
- *Financial Wealth for my Children



WHY DID I CHOOSE THIS JOURNEY?

I am different...I strive to serve humbly, be patient and kind. I am understanding and compassionate. I am persistent and willing...I am here to glorify God in all that I do.

To dream is to believe in God's dream. We are to live to serve others and to glorify God. And as we are favored and blessed, we also are to bless. Not only do I desire to ensure the security of my family, but to change the "poor mentality", to share joy with others and to assist in the breaking of generational chains. It is time for us to have the courage to have faith and move forward. I go as He leads me and from there, wealth is built. I want to change my life and those around me.

faith
can
move
mountains

beyo
brave



FAITH. FAMILY. FITNESS. FUN.