

new vision law™

New Vision Business Strategy Plans

Our thoughtful business planning packages provide varying levels of strategic and implementation support, suited to your unique needs and goals.

SILVER	GOLD	PLATINUM
PROFESSIONAL PLAN	BUSINESS PLAN	EMPIRE BUILDER PLAN
For the Professional who...	For the Business Owner who...	For the Empire Builder who...
is just getting started up or operating a solo professional practice, and wants to make sure s/he is fully set up for maximum success with the right amount of legal planning, insurance protection, financial systems and tax strategies in place.	has a business that includes employees or independent contractors, and wants to make sure s/he is on track for maximum success with the strategic guidance necessary to make quick decisions, correctly, and with all the right structures and systems in place to minimize risk and maximize return on investment of time, energy, attention and money.	isn't just building a business, but an empire with multiple revenue streams, and desires full personal and entity level asset protection, plus consistent leadership support in ensuring the entire empire is fully optimized for maximum impact with minimal risk.
Your Professional Plan...	Your Business Plan...	Your Empire Builder Plan...
<p>Includes review of all legal systems from incorporation to intellectual property protection to contracts and team member set up and varying levels of support to get all of your legal systems securely in place;</p> <p>Includes review of personal and business insurance needs and amounts to ensure proper levels of protection are fully in place;</p> <p>Includes review of financial systems + support to set up weekly, monthly, quarterly and annual financial reviews;</p> <p>Includes review of tax strategies to ensure maximum savings on taxes is taking place;</p> <p>Includes quarterly pre-scheduled strategic meetings for one year + emergency support via text or email in between + implementation,</p>	<p>Everything in the professional level plan PLUS registration and monitoring of up to 2 trademarks, and easy to update, customized independent contractor or employee agreement, vendor and client agreements and business entity set up and maintenance for one business entity;</p> <p>PLUS, management of all insurance policies, including life, business, key man (where necessary), and employment practices;</p> <p>PLUS, monthly P&L review with bookkeeper to ensure all income and expenses are properly categorized and ready to go to CPA at year end;</p> <p>PLUS, annual consultation with CPA to maximize tax savings;</p> <p>AND, monthly pre-scheduled strategic decision-making calls, emergency emails, text or vox in between, and implementation depending on level of support chosen.</p>	<p>Includes everything in the professional and business plans PLUS full analysis of the best way to create and manage entities for maximum protection for and from the empire builder;</p> <p>PLUS, consistent strategic growth support (which may include lease reviews, financing or capital acquisition support or enhanced IP protection);</p> <p>PLUS, custom contracts for clients, vendors, service providers and team members and full estate plan review/coordination with counsel to ensure all assets are held properly for maximum protection;</p> <p>PLUS, up to 4 strategic/financial meetings a month, which could include time with bookkeeper focused on monthly P&L categorization, cashflow tracking, and/or weekly team meetings;</p> <p>PLUS, twice annual meeting with tax advisors to maximum strategic tax opportunities.</p>
Fee Level: \$_____/mo	Fee Level: \$_____/mo	Fee Level: \$_____/mo