

Take your business to **the next level** and **maximise its value**

As a business owner, your wealth and wellbeing are inextricably linked to your business. It is your source of income, your most important asset and frequently its sale will fund your retirement. So why do many business owners not know the real commercial value of their business, or understand how to maximise its value?

The **Board of Advice (BoA) Program** supports SMEs to grow the value of their business with personalised support where the business needs it most. We provide the framework for SMEs to establish an internal BoA to provide business owners and stakeholders with regular access to expert advice in how to take the business to the next level. The **Program** allows owners to address their key strategic and operational challenges while developing their own internal business management skills.

The **key outcome** is the successful implementation of growth, value improvement and succession planning strategies supported by independent and objective advice from a trusted team of experts.

THE BoA PROGRAM INCLUDES



Business Valuation

We value your business at the start of our engagement to determine its true value and identify value improvement opportunities.



Regular Meetings

Using formal face to face meetings the BoA addresses your priorities by developing and documenting Agendas, Minutes and Action Plans to implement your chosen goals and strategies.



Financial Performance Management

We support BoA meetings with in-depth analysis of key profit, cash flow and value drivers including:

- Establishment, management and review of annual profit and loss and cash flow budgets;
- Profit/cash flow optimisation analysis;
- Review of Financial & Industry Benchmarks;
- Review of Bank and other key Stakeholder commitments.



Strategic, Operational and Governance Matters

The BoA provides a structured decision making process. Regular attention to management issues, with external input reduces business risks and threats and ensures urgent matters are addressed.



Maximise your Sale Price

The BoA provides support to implement 'best practice' procedures and develop internal skills so your business can operate without you. This allows you to prepare your business for sale, or your exit from day to day operations.



Demonstrated Value of Program - Business Revaluation

We will revalue your business on the anniversary of our engagement to show you how the BoA service has increased the value of your business.

We then update your net worth to highlight the growth in your wealth and reduced value gap risk.

DO YOU WANT TO ACHIEVE FINANCIAL INDEPENDENCE AND SECURITY?

Our **BoA Program** empowers you to take control of your future by growing the value of your business. This may be just what you are looking for, if you are relying on the sale of your business to fund your next venture or retirement.

PHONE

09 309 3222

EMAIL

support@insightca.nz

LOCATIONS

44 Sovereign Street, Flat Bush, Auckland 2019

MAIL

PO Box 64201, Auckland 2163

WEBSITE

www.insightca.nz

insight

Profit. Cash Flow. Value.