



Accounting Firm

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Business Plan [YEAR]

Prepared By

 John Doe

 (650) 359-3153

 10200 Bolsa Ave, Westminster, CA, 92683

 info@upmetrics.co

 <https://upmetrics.co>

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1.

Executive Summary

Product and Services

Vision Statement

Mission Statement



TIP

Five Zero Financial Consulting, LLC is a registered and licensed financial consulting firm with bias in accounting services and will be based in New York City – New York. The company will handle all aspects of accounting related services; services such as auditing accounting records, designing accounting systems, preparing financial statements, developing

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Product and Services



TIP

Five Zero Financial Consulting, LLC is going to offer varieties of services within the scope of the financial consulting services industry in the United States of America. Our intention of starting our accounting services firm is to work with both smaller organizations (startups and mom and pop shops) and also well-established corporate organizations who would want

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Vision Statement



TIP

Our vision is to build an accounting service firm brand that will become the number one choice for both smaller businesses and corporate clients in the whole of New York City – New York. Our vision reflects our values: integrity, service, excellence, and teamwork.

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Mission Statement



TIP

Our mission is to provide professional, reliable, and trusted accounting services that assist startups, corporate organizations, and non-profit organizations in handling their accounting cum financial related concern. We will position the business to become one of the leading brands in the accounting services line of business in the whole of

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2.

Business Overview

Business Structure

Roles and Responsibilities

Business Structure



TIP

Normally we would have settled for two or three staff members, but as part of our plan to build a standard accounting services firm in New York City – New York, we have perfected plans to get it right from the beginning which is why we are going the extra mile to ensure that we have competent, honest and hardworking employees to occupy all the available p

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Roles and Responsibilities



TIP

- Increases management's effectiveness by recruiting, selecting, orienting, training, coaching, counseling, and disciplining managers; communicating values, strategies, and objectives; assigning accountabilities; planning, monitoring, and appraising job results; developing incentives; developing a climate for

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Chief Executive Office

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TIP

- Responsible for providing accounting advice to corporate clients
- Provides accounting advice to individuals and small businesses
- Responsible for handling accounts preparation
- Responsible for handling financial auditing ser

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Accounting and Tax Consultants

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TIP

- Responsible for overseeing the smooth running of HR and administrative tasks for the organization
- Designs job descriptions with KPI to drive performance management for clients
- Regularly held meetings with key stakeholders

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Admin and HR Manager

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- Identifies, priorities, and reaches out to new partners, and business opportunities at all.
- Identifies development opportunities; follows up on development leads and contacts; participates in the structuring and financing of new business ventures; assures the completion of relevant projects.

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Marketing and Sales Executive

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- Responsible for preparing financial reports, budgets, and financial statements for the organization
- creates reports from the information concerning the financial transactions recorded by the bookkeeper
- Prepares the income statement and balance sheet

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Accountant

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- Welcomes guests and clients by greeting them in person or on the telephone; answering or directing inquiries.
- Ensures that all contacts with clients (e-mail, walk-In center, SMS, or phone) provide the client with a personalized customer service experience of the highest level.

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Client Service Executive / Front Desk Officer

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3.

SWOT Analysis



TIP

Five Zero Financial Consulting, LLC engaged the services of a core professional in the area of business consulting and structuring to assist the firm in building a well-structured accounting services firm that can favorably compete in the highly competitive financial consulting services industry.

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Strengths

Our core strength lies in the power of our team; our workforce. We have a team that can go all the way to give our clients value for their money; a team that is trained and equipped to pay attention to details and to deliver excellent jobs. We are well-positioned and we know we will attract loads of clients from the first day we open our door for business.



Weaknesses

As a new accounting services firm, it might take some time for our organization to break into the market and gain acceptance especially from corporate clients in the already saturated financial consulting services industry; that is perhaps our major weakness. So also, we may not have the required cash to give our business the kind of publicity we would have loved to.



Opportunities

The opportunities in the financial consulting services industry are massive considering the number of mom and pop businesses, startups, and of course corporate organizations that can't afford to do without the services of accounting service providers. As a standard and well-positioned accounting service provider, we are ready to take advantage of any opportunity that comes our way.



Threats

Some of the threats that we are likely going to face as an accounting service firm operating in the United States are unfavorable government policies, the arrival of a competitor within our location of operations, and global economic downturn which usually affects purchasing/spending power. There is hardly anything we can do as regards these threats other than to be optimistic that things will continue to work for our good.



4.

Market Analysis

Market Trends

Target Market

Competitive Advantage

Market Trends



TIP

The financial consulting services industry is indeed a very large industry and of course, it is one industry that works for businesses across different industries. If you are conversant with the trend in the financial consulting services industry, you will agree that loads of mom and pops, businesses, and start up ventures that do not have the capacity to hire charte

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Target Market



TIP

The demographic and psychographic composition of those who need the services of accounting services providers cuts across both small businesses and large corporations.

Five Zero Financial Consulting, LLC will initially serve

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Competitive Advantage



TIP

The level of competition in the financial consulting services industry depends largely on the location of the business and of course the niche of your financial consulting services. If you can successfully create a unique brand identity for your accounting services firm or carve out a unique market, you are likely going to experience less competition.

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5.

Sales And Marketing Strategy

Sources of Income

Sales Forecast

Pricing Strategy



TIP

We are mindful of the fact that there are stiffer competitions amongst accounting service firms and other related financial consulting service providers in the United States of America; hence we have been able to hire some of the best business developers to handle our sales and marketing

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Sources of Income



TIP

Five Zero Financial Consulting, LLC is established with the aim of maximizing profits in the financial consulting industry and we are going to go all the way to ensure that we do all it takes to attract clients on a regular basis and sign 'retainer – ship' with most of our clients.

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Sales Forecast



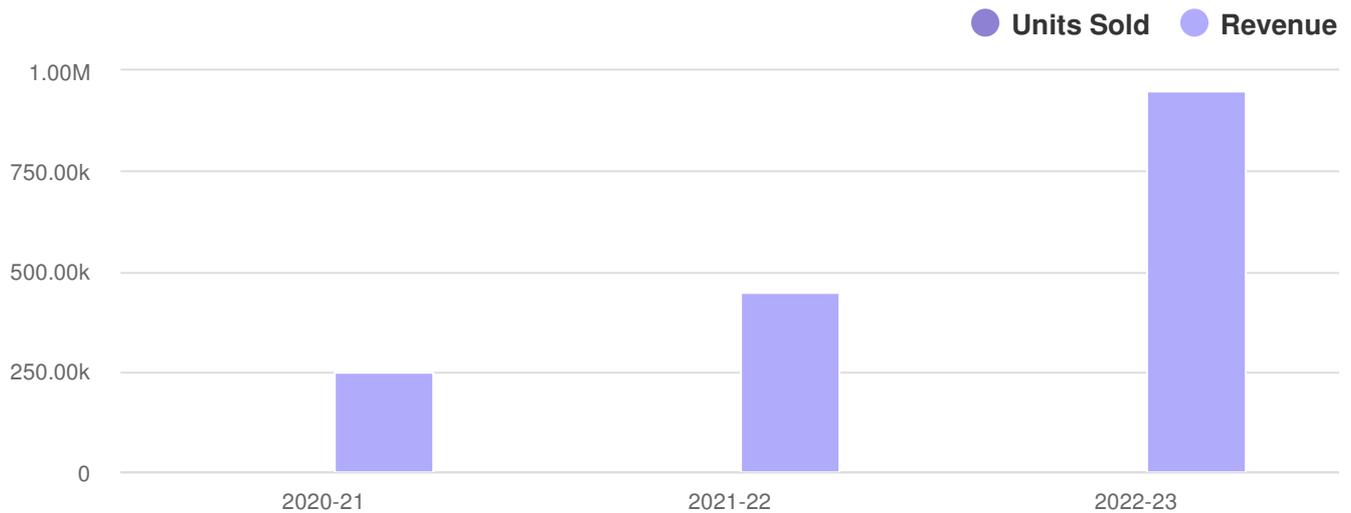
TIP

One thing is certain, there would always be a mom and pop shops, startups, NGOs, and corporate organizations that would need the services of professional accounting services firms.

We are well-positioned to take on the available market. To unlock help try Upmetrics!

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No. of clients v/s Revenue Chart



Financial Year	Units Sold	Revenue
2020-21	1550	250000
2021-22	1800	450000
2022-23	2050	950000

Pricing Strategy



TIP

Hourly billing for financial consulting services is a long-time tradition in the industry. However, for some types of financial consultancy services, flat fees make more sense because they allow clients to better predict consultancy costs. As a result of this, Five Zero Financial Consulting, LLC will charge our clients a flat fee for many basic services such as ad

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TIP

The payment policy adopted by Five Zero Financial Consulting, LLC is all-inclusive because we are quite aware that different customers prefer different payment options as it suits them but at the same time, we will ensure that we abide by the financial rules and regulation of the United States of America

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Payment Options

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6.

Publicity and Advertising Strategy



TIP

We have been able to work with our brand and publicity consultants to help us map out publicity and advertising strategies that will help us walk our way into the heart of our target market. We are set to take the financial consulting services industry by storm which is why we have made provisions for effective publicity and advertisement of our accounting services.

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7.

Financial Plan

Financial Projections and Costing
Generating Funds/Startup Capital

Financial Projections and Costing



TIP

Starting an accounting services firm can be cost-effective; this is so because, on the average, you are not expected to acquire expensive machines and equipment.

Basically, what you should be concerned about is th [To unlock help try Upmetrics!](#)

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Generating Funds/Startup Capital



TIP

Five Zero Financial Consulting, LLC is a business that will be owned and managed by Rowland Pence and his business partner Stanford Darlington. They are the sole financial of the firm, but may likely welcome partners later which is why they decided to restrict the sourcing of the start-up capital for the business to just three major sources.

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8.

Sustainability and Expansion Strategy



TIP

The future of a business lies in the number of loyal customers that have the capacity and competence of the employees, their investment strategy, and the business structure. If all of these factors are missing from a business (company), then it won't be too long before the business closes shop.

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