

2024

planner

2024



Happy
New
Year!

"I do not believe that you can do today's job with yesterday's methods and be in business tomorrow."

-Horatio Nelson Jackson

You killed it last year!

But you know that has nothing to do with this coming year.

Enter the Strategic Planner.

This guide will combine your business and personal strategies and look at it through a financial lens.

Growth Consulting Firm, LLC was built to serve owners on their financial journey, from scale to sale!

Time to roll up your sleeves. This next year is going to be even better!



How to use this planner

Step 1: Reflect on last year's activities and results. What worked and what did not work? What brought you joy and what brought you stress?

Step 2: Restate your Mission, Vision and Values for your business. If you have a personal mission, feel free to state it here as well. These are your guides for setting your goals. Everything you do should be a reflection of who you are and what you believe.

Step 3: Where do you want to be this time next year? This planner sets goals for your business, your family and your self.

Step 4: Identify the "big rocks" for each of your goals. These big rocks are milestones and priorities that will get you to the goal. For instance, a business goal of 2x revenue may have big rocks that include a marketing plan, a referral program, or fee analysis.

Step 5: Break your goals down into quarterly "sprints" that will help you measure your progress. For example, if you have a personal goal of reading 20 books this year, you'll need to read 5 books per quarter. Likewise, if you have a personal goal of running a marathon, you may only be able to run a 5k in Q1, but you'll have to work up to a 10k by Q2 and 13 miles by Q3.

Step 6: Add your CFO duties to ensure that you are progressing financially.

2023 Reflection

What did you accomplish?

How did you fail?

What were your obstacles?

Where did you find joy?

What is a favorite memory?

What did you dislike doing?

MISSION

reminders

MISSION

VISION

VALUES

WHERE DO YOU WANT TO BE? *december 2024*

MY BUSINESS

(REVENUE, EXPENSES, EMPLOYEES, CLIENTS)

MY FAMILY

(TIME, ACTIVITIES, RELATIONSHIPS)




MY SELF




(MENTAL, PHYSICAL, SPIRITUAL)

SPRINTS 2024

MY BUSINESS

ANNUAL BIG ROCKS

- 1. _____ 
- 2. _____ 
- 3. _____ 

- 1. _____ 
- 2. _____ 
- 3. _____ 

Q1 (JANUARY - MARCH)

ACTION STEPS

- 1. _____ 
- 2. _____ 
- 3. _____ 
- 4. _____ 
- 5. _____ 
- 6. _____ 
- 7. _____ 




Q2 (APRIL - JUNE)

ACTION STEPS

- 1. _____ 
- 2. _____ 
- 3. _____ 
- 4. _____ 
- 5. _____ 
- 6. _____ 
- 7. _____ 






Q3 (JULY - SEPTEMBER)

ACTION STEPS

- 1. _____ 
- 2. _____ 
- 3. _____ 
- 4. _____ 
- 5. _____ 
- 6. _____ 
- 7. _____ 

Q4 (OCTOBER - DECEMBER)

ACTION STEPS

- 1. _____ 
- 2. _____ 
- 3. _____ 
- 4. _____ 
- 5. _____ 
- 6. _____ 
- 7. _____ 

SPRINTS 2024

MY FAMILY

ANNUAL BIG ROCKS

- 1. _____
- 2. _____
- 3. _____

- 1. _____
- 2. _____
- 3. _____

Q1 (JANUARY - MARCH)

ACTION STEPS

- 1. _____
- 2. _____
- 3. _____
- 4. _____
- 5. _____
- 6. _____
- 7. _____

Q2 (APRIL - JUNE)

ACTION STEPS

- 1. _____
- 2. _____
- 3. _____
- 4. _____
- 5. _____
- 6. _____
- 7. _____

Q3 (JULY - SEPTEMBER)

ACTION STEPS

- 1. _____
- 2. _____
- 3. _____
- 4. _____
- 5. _____
- 6. _____
- 7. _____

Q4 (OCTOBER - DECEMBER)

ACTION STEPS

- 1. _____
- 2. _____
- 3. _____
- 4. _____
- 5. _____
- 6. _____
- 7. _____

SPRINTS 2024

MY SELF

ANNUAL BIG ROCKS

1. _____

2. _____

3. _____

1. _____

2. _____

3. _____

Q1 (JANUARY - MARCH)

ACTION STEPS

1. _____

2. _____

3. _____

4. _____

5. _____

6. _____

7. _____

Q2 (APRIL - JUNE)

ACTION STEPS

1. _____

2. _____

3. _____

4. _____

5. _____

6. _____

7. _____

Q3 (JULY - SEPTEMBER)

ACTION STEPS

1. _____

2. _____

3. _____

4. _____

5. _____

6. _____

7. _____

Q4 (OCTOBER - DECEMBER)

ACTION STEPS

1. _____

2. _____

3. _____

4. _____

5. _____

6. _____

7. _____

THE CHIEF FINANCIAL OFFICER

TOP PRIORITIES OF 2024 PROTECT - ADVISE - ACHIEVE

Q1 (JANUARY - MARCH)

1. Review Owner Savings Strategy
2. Update Cash Flow Projections
3. Quarterly Tax Payment
4. Rebalance Investment Accounts
5. Gather tax documents & meet CPA
6. Insurance Needs Analysis
7. Update Balance Sheet
8. Project Management Budget Forecast
9. Vendor Management
10. IT Systems & Digital Needs Review

Q2 (APRIL - JUNE)

1. Budget Analysis
2. Update Cash Flow Projections
3. Quarterly Tax Payment
4. Risk Assessment & Review
5. File tax return or extension
6. Client Satisfaction Survey
7. Debt Assessment
8. Inventory Review
9. Accounts Receivables Collection
10. ROIC Analysis

Q3 JULY - SEPTEMBER

1. Owner Retirement Contributions
2. Update Cash Flow Projections
3. Quarterly Tax Payment
4. ESG Program Strategy
5. Growth & Performance Projections
6. Stakeholder Engagement Strategy
7. Internal Audit
8. Review Key Metrics
9. Update Policies & Procedures
10. Regulatory Responses & Queries

Q4 (OCTOBER - DECEMBER)

1. Tax Loss Harvesting
2. Update Cash Flow Projections
3. Quarterly Tax Payment
4. Owner Estate Review
5. Tax Planning with CPA
6. Extension Filing Deadline
7. Business Model Review
8. Charitable Gifting
9. Employee Benefits Review
10. Accelerate or Defer Income or Expenses

Two Family CFOs

COUPLES MEETING AGENDAS

PROTECT - NURTURE - THRIVE

WEEKLY (5-10 MIN)

1. Cash Flow Meeting

- Discuss spending progress (in/out)
- Discuss any new information

MONTHLY (15-20 MIN)

1. Budget Analysis

- 2. Update Cash Flow Projections
- 3. Discuss any changes to spending



QUARTERLY (30 MIN)

- 1. Review Savings Strategy
- 2. Update Cash Flow Projections
- 3. Debt Assessment
- 4. Work on bigger financial tasks

ANNUALLY (1HR+)

- 1. Gather tax documents & meet CPA
- 2. Expense Analysis
- 3. Set big spending goals (travel, repairs, etc)
- 4. Get Social Security statement (ssa.gov)
- 5. Review retirement savings
- 6. Review Employee Benefits and Insurance
- 7. Accelerate or Defer Income or Expenses
- 8. Set Charitable Gifting Goal, if desired
- 9. Update Net Worth Statement
- 10. Full Investment Review



You Got This!

I'm committed to helping you succeed!

If this feels daunting, know that you are not alone. Hiring a fractional CFO for your business and a wealth planner for your life has many benefits:

- Increased ROI
- Save time and money
- Better sleep at night knowing that all of your financial concerns are addressed

Fortunately you've come to the right place. I combine both of your worlds and help you make the best decisions for your unique life as a business owner.

Contact me today to get started.

Christina Gamache

CGAMACHE@GROWTHCONSULTINGFIRM.COM

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ANCHORAGE AK 99511

(888)805-4048



notes



2024 *Calendar*

JANUARY

| S | M | T | W | T | F | S |
|----|----|----|----|----|----|----|
| | 1 | 2 | 3 | 4 | 5 | 6 |
| 7 | 8 | 9 | 10 | 11 | 12 | 13 |
| 14 | 15 | 16 | 17 | 18 | 19 | 20 |
| 21 | 22 | 23 | 24 | 25 | 26 | 27 |
| 28 | 29 | 30 | 31 | | | |

FEBRUARY

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| 18 | 19 | 20 | 21 | 22 | 23 | 24 |
| 25 | 26 | 27 | 28 | 29 | | |

MARCH

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| 17 | 18 | 19 | 20 | 21 | 22 | 23 |
| 24 | 25 | 26 | 27 | 28 | 29 | 30 |
| 31 | | | | | | |

APRIL

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MAY

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JUNE

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JULY

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AUGUST

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SEPTEMBER

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OCTOBER

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NOVEMBER

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DECEMBER

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