

INTENTIONAL GROWTH™

VIEW - AND RUN - YOUR COMPANY LIKE A FINANCIAL ASSET

- Get clear on what you want from the business and why.
- Focus on growing equity value so you have the freedom of choices in the future.
- Use the financials as a strategic roadmap to guide you from where you are to where you want to be.
- Use your business as a vehicle to enjoy work, create wealth, and make an impact.



"I feel that as a business owner, sometimes I get into a rhythm or maybe a rut and doing things a certain way, almost methodically. The training allowed me to intentionally disrupt the rhythm and look at things through a different lens."

Jaime Gmach // CEO, Evolving Solutions

"I think the most concrete business practice that Sara and I adopted was actually understanding our company's value and forecasting our value on an ongoing basis as a metric for understanding our health as a company."

Anne Dougherty // Founder & Co-Owner,
ILLUME Advising

"Making the decision to partner with Arkona has been revolutionary for the financial health of our business. As a business owner, I feel less anxiety and more clarity regarding the financial health of my business. I'm so grateful that Arkona has provided me with the education, tools, and a knowledgeable team of advisors to grow my company's enterprise value."

Steve Schaffer // Owner, Schaffer Manufacturing

INTENTIONAL GROWTH™ VISION BOARD

YOUR VISION	What do you want from the business and why?		VALUE GROWTH SCORECARD				
	What is your ideal role in the business and why?		(1 = POOR // 4 = BEST IN CLASS)				
FINANCIAL TARGETS	2025 Salary \$ _____ Distributions \$ _____	Current Equity Business Valuation \$ _____	FINANCIALS	1	2	3	4
	2027 Salary \$ _____ Distributions \$ _____	Target Equity Business Valuation \$ _____	LEADERSHIP	1	2	3	4
	2030 Salary \$ _____ Distributions \$ _____	Target Equity Valuation Date _____	STRATEGIC PLANNING	1	2	3	4
	VALUE GAP \$ _____		SALES	1	2	3	4
			MARKETING	1	2	3	4
EXIT OPTIONS	<u>Ownership Exit Options I Want to Learn More About</u> • • •		PEOPLE	1	2	3	4
			OPERATIONS	1	2	3	4
			LEGAL	1	2	3	4

