

AgencyCFO™ FINANCIAL FLUENCY

Created for agencies under \$2 million in revenue



In the world of insurance there is training for every role from receptionist to executive – every role **except** accounting/financial. This is a critical gap, especially for growing agencies. Without access to strategic financial guidance, there is a tremendous learning curve for agency owners. Where there is a strategic gap, there is the AgencyCFO™ program ready to fill it.

The AgencyCFO Executive Academy™ is a resource center for agency owners to have access to the guidance and tools needed to strategically work on their agency's future.

Financial Fluency brings together growth-minded agencies through a cohort-based, financial course. Agency owners will be able to adopt the practices of a "Mid-Agency Mindset™" at a fraction of the cost for the full AgencyCFO™ program.

Facilitated with open dialogue between AgencyCFO™ experts and agency owners, members will be equipped to control their agency's financial trajectory.

Connect with us at:

<https://www.agencycfo.com/execacademy>

for more information on the next Academy cohort!

Your Team of AgencyCFO™ Experts

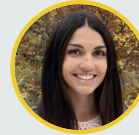


CAYLA CARRILLO

As program facilitator, Cayla will seamlessly guide your cohort through the course sessions.



You'll also have the guidance of our entire team of experts along the way!



As part of the course, agency owners will receive:

- An AgencyCFO™ Review of your Financial Statements
- Annual Financial Plan and Monthly Results Reporting Template
- Tailored tools from our AgencyCFO Toolbox™ delivered virtually through live training sessions
- Direct access to expert guidance through Q&A
- Individual "check in" sessions with an Agency Custom Financial Officer™
- Online access to all provided materials
- Open email access to the team of experts
- Incentive and guidance to grow into the various AgencyCFO™ programs

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VIRTUAL COURSE DATES

1/11/24 2-3PM EST

Session 1:

Meet the Cohort

1/18/24 2-4PM EST

Session 2:

The CFO Foundations

1/31/24 2-4PM EST

Session 3:

Create Your Financial Plan

2/07/24 2-4PM EST

Session 4:

Measuring Your Results

**THE FIRST CHECK IN SESSIONS WILL TAKE PLACE AFTER SESSION 4.*

3/06/24 2-4PM EST

Session 5:

Trust Accounting & Cash Flow Management

3/20/24 2-4PM EST

Session 6:

Best Practices & KPIs in Action

4/03/24 2-4PM EST

Session 7:

Moving Forward

**THE FINAL CHECK IN SESSIONS WILL TAKE PLACE AFTER SESSION 7.*

WHO CAN ATTEND?

Agency Owners with at least 2% ownership stake.

BONUS: Each agency owner within a Fluency cohort can have up to 2 employees join them! Note, **agency owners must attend all sessions** and cannot send the employees in their place.

PRICING

\$4,500

- Must be paid in full at the event.
- Yes, credit cards ARE accepted.
- No refunds after the first session.
- \$2,000 credit towards transition to other AgencyCFO packages.

AGENCYCFO PREFERRED PARTNER PRICING

\$4,000

**Ask an AgencyCFO Expert if you qualify!*

FOR FULL DETAILS ON OUR UPCOMING COHORT, PLEASE VISIT US AT:

www.agencycfo.com/execacademy

*Or,
SCAN THE
QR CODE!*

