Your client's biggest asset is the business.

For most of your owner clients, the business is the largest asset in the plan and the least understood one.

WHAT WE HEAR

"We're planning around a value we can't verify."	An objective assessment of the business, benchmarked against its industry.
"My client can't step away from the business."	We build the team and the systems, so the business no longer depends on the owner.
"The exit is coming, and the business isn't ready."	A 3, 6, 9 and 12-month roadmap that builds the value before the exit.

WHEN TO BRING US IN

Net worth tied up in the business Most of the plan in one asset	**No reliable value** A number nobody has tested	**An exit in one to five years** Time to build value
The owner can't step away The business depends on them	**Succession unsettled** Family, management or a sale	**A liquidity event ahead** Planning around a number that isn't ready

Your clients know their business. Few have the time or capacity to make it worth what the plan assumes.

EXPERTISE KNOWLEDGE
CAPACITY EXPERIENCE

HOW THE WORK RUNS: THE CMG 360™ PLATFORM



Optional · Flags it

An optional 20-minute first look, or go straight to the Assessment.

Names it

The specific issues, ranked, with a 3, 6, 9 and 12-month roadmap.

Fixes it

We work the plan with you: weekly cash and KPI updates, monthly results and a review.

We turn Random Excellence™ into Deliberate Excellence™.

Random Excellence™ is being world-class at one thing while failing at everything else. We build the plan, the numbers and the discipline so the business performs across all seven domains, by design.

Refer the owner
CMG FS does the work to make the business worth more.

We do the work
The Assessment names the issues. The Monthly fixes them.

You plan with real numbers
A value you can stand behind.

CMG Financial Solutions™ · Building Better Businesses
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