

MASTERY PACKAGE

AGENCIES **OVER \$1.25 MILLION** IN REVENUE

Exclusively provided through

THE
AgencyCFO™
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RD ADVISORY
GROUP

Filling the Strategic Gap in Agency Finances

Going it alone doesn't cut it anymore in this incredibly complex world. All too often, agency owners face key decisions without a true picture of the FINANCIAL IMPACT their decision actually makes. Just as frequently, they lose their strategic edge due to the constant focus on tactical (bookkeeping) and taxes (CPA) for the agency. What's needed to fill the strategic gap? An expert CFO in the world of independent insurance agencies.

The AgencyCFO™ is the industry's must-have financial resource to fill those missing pieces AND comes at a fraction of the cost of a full-time CFO.

We offer one-of-a-kind, custom financial solutions for independent insurance agencies across the United States. No longer do you have to go it alone!

Agencies in this package will receive:

- Introductory AgencyCFO™ Assessment
- Monthly Earnings and Strategic Calls
- Annual Financial Plans with Budgeted Metrics
- Benchmarking Analysis with ongoing updates
- Monthly Results presented in the custom AgencyCFO™ Financial Report

Your AgencyCFO™ Experts



Learn more:



- Strategic Project Work utilizing the AgencyCFO Toolbox™ in areas such as Compensation Plans, Growth and Vision Tools, Pro-forma Development, and the list continues with the latest AgencyCFO™ custom solutions!
- Unlimited access to guidance from the entire team of experts.

Contact us today at rdagteam@rdadvisorygroup.com for more information on how to move your agency forward and join the AgencyCFO™ program.

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ACCELERATOR PACKAGE

AGENCIES IN BETWEEN \$500K - \$1.25 MILLION IN REVENUE

THE
AgencyCFO[™]
Powered by
RD ADVISORY
GROUP

Tailored Solutions for Growing Agencies

Independent insurance agencies in between the \$500k to \$1.25 million revenue range often face the same fundamental strategic, financial questions as larger agencies... yet without having the same resources available to answer them. The AgencyCFO[™] Accelerator package solves the "gray area" with a cost you can afford. We are CFOs after all! The monthly one-on-one call, supported by tailored tools, presents just the right amount of insight and information to keep your agency moving forward. If you are ready to level the playing field with larger agencies, the AgencyCFO[™] Accelerator is your must-have strategic partner.

You're no longer "too small" to receive custom-tailored solutions OR to need a CFO! Having an AgencyCFO[™] on a more tailored basis will serve your needs to increase value and move your agency forward.

Agencies in this package will receive:

- Introductory AgencyCFO[™] Assessment
- Monthly One-on-One Call with an Agency CFO
- Annual Financial Plans with Budgeted Metrics
- Benchmarking Analysis with ongoing updates
- Monthly Results presented in the custom AgencyCFO[™] Financial Report

Your AgencyCFO[™] Experts



Learn more:



- Access to tailored tools from the AgencyCFO Toolbox[™] that are designed around the unique needs of agencies within \$500k to \$1.25 million in annual revenue
- Incentive, guidance, and plan to grow into the full AgencyCFO[™] Mastery package

Contact us today at rdagteam@rdadvisorygroup.com for more information on how to move your agency forward and join the AgencyCFO[™] program.



Agency owners under \$750k in revenue must take a “hands-on” approach in all aspects of their daily agency life. Constantly focused towards working **IN** the business, that working **ON** the business takes a backseat. **Until now. Learn the insider strategies of larger agencies through the AgencyCFO Executive Academy™.**

The AgencyCFO Financial Fluency™ Course

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™ will bring together growth-minded agencies through a three-month, cohort-based learning course. Agency owners will be able to adopt the practices of a “Mid-Agency Mindset™” at a small fraction of the cost for the full AgencyCFO™ program.

As part of the AgencyCFO Financial Fluency™ Course, agency owners will receive:

- Tailored tools from our AgencyCFO Toolbox™ delivered **virtually** through **five, live training sessions**
- Direct access to expert guidance through live Q&A
- Online **access to all material** through the AgencyCFO Executive Academy™ Portal
- Open **email access** to the team of experts
- Access to our **private, members-only, LinkedIn group**
- The ability to **“buy” more** individual time at a **group reduced rate**
- Incentive and guidance to **grow into the various AgencyCFO™ programs**

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. You no longer have to go it alone.

Meet the AgencyCFO™ Experts



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

Contact us today at

acfoexecacademy@rdadvisorygroup.com

for more information on how you can join the next Academy cohort!