JOIN FOR AN IN-PERSON WORKSHOP TO EXPLORE HOW TO TRANSFORM YOUR BUSINESS

Central Coast
VALUE NETWORK

LIMITED SEATS

THE CLEAR PATH TO BUILD A BUSINESS WORTH KEEPING — OR SELLING



Thursday, February 19, 2026

For Business Owners

3 - 5pm in San Luis Obispo Farm Bureau

Tickets Available Now

$50 pre-register, members use promo code "VPSave50" to save 50% off

Gain clarity, increase business value, and create long-term wealth and freedom.

Value Network Panel Speakers



BARRY FISHER
CEO, Blaze 'N Bear Insurance Services, Inc.



ERICKA SCOTT
Founder, Book a COO & Strategic Plan Now



JACOB ROTHMAN
Principal, Rothman Investment Management

REGISTER NOW

Who should attend...

- Unclear on what your business is really worth
- Operations or team aren't running efficiently
- No defined exit strategy or succession plan
- Need alignment between business value and personal wealth goals



JAKE FREDRICK
Moderator, BBSI

FOR MORE INFO: 805-270-0007

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ClearPath
VALUE ACCELERATOR FRAMEWORK

Is your business truly ready — *for growth, succession, or sale?*

Join us for a high-impact program for established business owners ready to increase the value, scalability, and transferability of their company.

Accurate Business Valuation & Risk Management

- Comprehensive BizEquity Valuation Report with estimates of value: asset, equity, enterprise, and liquidation
- Industry-benchmarked KPIs to assess financial and operational health
- Peer comparisons to understand how your business performs relative to similar companies
- Risk and value-driver insights to inform insurance, succession, and protection strategies

Strategic Business Roadmap

- Strategic Business Roadmap aligned to personal and business outcomes
- Connects your valuation reports and investment goals
- Includes accountability and implementation checkpoints to drive progress

Purpose-Based Financial Plan

- Clarify your values and life priorities
- Visualize your ideal retirement lifestyle
- Calculate what it will take to fund your future
- Get personalized strategies for investments, savings, and legacy planning

HR and Compliance Review

- HR & Operations Compliance Check to identify process and compliance gaps
- Evaluation with a summary of findings
- Opportunity to receive custom service quotes (e.g., timekeeper audit, workforce planning)

Partner Integration & Support

- A coordinated team spanning valuation, finance, operations, and insurance—acting as your strategic "Board of Directors"
- Seamless collaboration with existing advisors such as your CPA, business attorney, and other trusted professionals
- Actionable guidance to support informed decisions and build long-term business value

Workshop

- 2-Hour Informational Workshop
- Readiness Checklist
- Live Panel Discussion: Building & Protecting Business Value

Learn about the ClearPath Value Accelerator program

- Access to tools, experts, and a proven roadmap to scale or exit
- 1:1 Supported business value accelerator program, tailored to your unique needs
- 12-18 month period

You have the power to protect your business.

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