

# The Problem: Your business is doing well, but you're not clear on how to manage expenses as you grow to increase profits.

## HOW THIS SHOWS UP IN YOUR BUSINESS:

- Lack of clarity around profitability by product and capacity constraints
- No forward-looking budget used for strategic planning and vision work
- Difficulty managing team member accountability due to poor, or no, data
- Consistent trouble deciding how to use scarce resources (people, money, time) across competing opportunities

## HOW WE HELP:

Prism Financial Concepts team members are not only licensed financial advisors, but include professionals with a diverse background of corporate and tax experience necessary to engage three core areas of business advancement:

- **Financial Forecasting & Budgeting**
- **Strategic Planning & Execution**
- **Capital Allocation Decision Support**

Businesses making less than \$25mm of annual revenue often have highly interconnected personal and business balance sheets and income statements, making it difficult for owners to confidently know where and how to best place their capital.

By working at the intersection of your business and personal life, Prism professionals solve a common and most often unaddressed small business problem that can render business planning all but ineffective: the lack of cohesive and comprehensive advice for the company with proper consideration for the owners' personal financial plans.

Learn more at [www.prismfc.com](http://www.prismfc.com)



*The Financial Team That Empowers You*



## BILL'S CORE COMPETENCIES



Financial Analysis  
& Data Synthesis



Six Sigma Master



Financial Forecasting  
& Decision Tools Creation

Bill has 28 years of executive experience leading quality and operations teams at Raytheon, Dell, Emerson, GM, Ford and ABB. His 'zone of genius' is projecting future outcomes through the use of mathematical modeling. By analyzing the current baseline and modeling the effect of variables over time, he was able to pinpoint highly accurate factory capacity changes and product warranty costs years into the future.

Since then, Bill has taken his big-company modeling experience and applies it to helping companies become more profitable. He also helps individuals and couples gain clarity on their financial outlook 40+ years into the future.

Bill is a Chartered Retirement Planning Counselor and holds a BS in Industrial Engineering and MBA in Marketing. He is happily married with two grown children and lives in Scottsdale, Arizona. When not traveling with his family, he can frequently be seen hiking or volunteering in the McDowell Sonoran Preserve.