

The Problem: You have an early to mid-stage business heavily dependent on technology that is poised to expand but juggling multiple legal issues on a regular basis, and find yourself paying significant legal fees to attorneys.

JERRY'S PERSPECTIVE

Entrepreneurs are fierce, independent, driven, and diverse, which means the legal needs of each business requires an individual approach. Mindset matters and we take the time to frame each issue and approach each problem in the most positive and constructive way possible.

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:

- **Develop a more effective process for capturing and processing leads**
- **Explore strategic partnerships and create the appropriate structures**
- **M&A analysis and strategy**
- **Implement better systems and processes to alleviate admin burden**

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.

HOW THIS SHOWS UP IN YOUR BUSINESS:

- You are not comfortable with the price and responsiveness of your law firm
- Your current attorney(s) miss the nuances in your products or services
- You have been approached for acquisition or you are considering acquiring
- You struggle with the legal intricacies of your decision-making

Learn more at www.prismfc.com



JERRY'S CORE COMPETENCIES

-  Risk Management
-  M&A Negotiations
-  Due Diligence & Vetting

Jerry is a seasoned attorney and strategic advisor with over 20 years' experience representing businesses as outside counsel, as well as being an entrepreneur, consultant and C-level executive. He has first-hand understanding of technology, operations, strategic planning, effective team building and risk management, and is committed to helping clients achieve their goals through trust, integrity, creativity and solid execution.

The Financial Team That Empowers You