



FP TRANSITIONS®

ONE PAGE BUSINESS PLAN TEMPLATE

#FPINSIGHTS

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TEMPLATE PLAN

Writing a business plan is an opportunity to carefully think through your company's annual business so you can best prepare for success. This is your chance to discover weaknesses in your business, identify opportunities you may not have considered, and plan for how best to deal with challenges to come. Be honest with your planning and do not avoid potential problems/concerns. The point is to provide solutions to the challenges of running your business.

Things to consider when developing your plan:

- Be clear and concise.
- Avoid using industry specific jargon or terminology.
- Most of your time should be spent researching and thinking not writing.
- Document your research include sources of any information.
- Avoid assumptions, claims, or broad statements.
- Be able to support the plan with facts/documents.
- Ensure all figures are accurate.
- Proofread your complete plan.

We acknowledge that most financial practitioners do not need to create a comprehensive business plan every year. This template is designed to provide the benefits of the business planning process in a more concise and easier to utilize fashion. It is intended for job holders, solo practitioners, and financial service professionals who have limited time for planning (poke intended).

INSTRUCTIONS FOR USE

SECTION 1: FIVE-YEAR VISION STATEMENT

The Executive Summary is the most important part of your business plan. Often, it's the only part that a prospective investor or lender reads. **Use the 5-year vision worksheet and write out the statement LAST.**

SECTION 2: WHO IS YOUR IDEAL CLIENT?

Look at your existing book and pick out your favorite clients to work with. Why are they your favorite clients to work?

SECTION 3: WHO IS COMPETITION AND HOW DO YOU STACK UP?

Use the SWOT Analysis worksheet to identify key competition and how you compare

SECTION 4: HOW DO YOU GET MORE OF THESE IDEAL CLIENTS?

Identify three ways that you will reach out to targets that fit your ideal client definition.

SECTION 5: HOW WILL YOU TRACK YOUR EFFORTS?

Identify no more than three core KPI's for your firm to measure your success

SECTION 6: MILLION DOLLAR ACTIVITIES (MDA'S)

Align your KPI's and your MDA's. Do not spend time on activities that do not generate results. Identify 3 MDA's you will focus on doing more of, 1 to 2 tasks/time drains that you need to stop doing or outsource, and 1 thing to improve your overall capabilities.

SWOT ANALYSIS WORKSHEET

	Strengths	Weaknesses	Opportunities	Threats
Product Offering				
Marketing				
Staff				
Finance				
Operations				
Market				

Can any of your strengths help with improving your weaknesses or combating your threats? If so, please describe how below.

Based on the information above, what are your immediate goals/next steps?

Based on the information above, what are your long-term goals/next steps?

FIVE-YEAR VISION STATEMENT WORKSHEET

	Today	One Year	Three Years	Five Years
Business Model/ Product Offering				
Marketing				
Number of Households and AUM				
Entity Structure				
Revenue				
Compliance				
Technology				
Centers of Influence				
Staff				
Office Space				
Compensation - Staff, Advisor, and Owner				
Other Overhead				



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