

ACCESSING CAPITAL FOR SMALL BUSINESS GROWTH: *A CPA's Perspective*

Chris Henderson, CPA/CITP
Principal

5 THINGS TO DO IMMEDIATELY

01



Relationships

Form relationships with sources of capital before you need the capital.

02



Business Plan

Have a clear business plan with as much financial detail as possible.

03



Stay Current

Keep up-to-date on industry trends and factor them into your plans.

04



Financial Statements

Maintain accurate, timely financial statements.

05



Advisory Board

Build an Advisory Board for your business and your executive team.

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5 KEY TAKE-AWAYS

- Build relationships before you need capital.
- Impart as much detail as you can in your business plans.
- Know your industry and stay ahead of changes.
- Never underestimate a clean, timely financial statement.
- Build and rely upon a business Advisory Board.



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QUESTIONS?

Please don't hesitate
to reach out!