



**MORRISON
& ASSOCIATES**

PARTNERING IN YOUR SUCCESS

FINANCIAL AWARENESS COACHING



WHY DID WE DEVELOP THIS SERVICE?

The better you understand your business, the easier it will be to make more money. Management decisions rely on a sound understanding of the financial implications for a business.

We have developed this service to enable Morrison & Associates' clients to fully understand and interpret their numbers, so they have strong foundation on which to grow their business.



WHO SHOULD HAVE FINANCIAL AWARENESS COACHING?

If you are passionate about your operation and want to better understand your numbers and be able to answer questions like:

- › How much profit have I made this year?
- › Why has my profit increased but I have no cash?
- › Is my cash level increasing or decreasing?
- › What is affecting my cash level?



WHAT IS INVOLVED?

You will attend meetings with us every two months to discuss your financial results. The focus of each meeting will change and progress depending on your needs and objectives.

YOU WILL:

- › Develop an understanding of your key financial reports
- › Gain knowledge of key accounting concepts
- › Learn how to report on cash flow and profit
- › Begin to produce your own customised reports on a monthly basis
- › Understand how to better manage your debtors and creditors
- › Learn how to monitor income and expenses throughout the year
- › Find ways to save time on admin tasks that could be automated
- › Identify weaknesses/areas to work on between meetings to get better results
- › Iron out any existing errors (formats, coding, analysis, timing differences)
- › Start to understand other information you may need to capture monthly (e.g. stock, debtors, creditors) and how to do this easily



WHEN SHOULD I BEGIN FINANCIAL AWARENESS COACHING?

Anytime is a good time to start understanding your financial reports in order to improve business performance.

The sooner you start Financial Awareness Coaching the better your understanding of financial results and their implications and the more control you will have over outcomes.



BENEFITS

- » Enables you to understand your business better
- » Will ensure accuracy in your financial reports by ironing out any existing errors
- » Better management and monitoring of your cash flow
- » Customised reports to ensure the right information is being provided in a format that makes decision making easier
- » Informed decision making and you will have better understanding of financial impacts of decisions
- » Independent financial advice
- » Be accountable for progress at each meeting by reviewing your reports and recording actions that need to be achieved before the next meeting
- » Identify burning issues that need to be addressed
- » Access the collective wisdom of our systems, products and services
- » Phone support to address any burning issues between meetings



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