



FREE
GUIDE

HOW TO BUILD YOUR

FINANCIAL DREAM TEAM

www.dennisonbookkeeping.com

WELCOME!

When it comes to your business finances, you can't do it **all** alone. To build a sustainable business, you need a team of trusted advisors on your side.

I'm going to break down the roles of each of the members of your financial dream team and share a few people you may want to interview for your business!

DREAM TEAM OVERVIEW



CPA



BOOKKEEPER



BANKER



INSURANCE AGENT



ATTORNEY

DUE DILIGENCE

Before trusting someone to be an advisor for you and your business, make sure to do your due diligence and ensure they're going to be a good fit!

DUE DILIGENCE CHECKLIST

Ask about their experience serving businesses in your industry

Read reviews and ask your peers for their recommendations

Don't be afraid to interview multiple options and request quotes

Double-check their licensure and certifications

Carefully review their service contracts before signing

CPA/ACCOUNTANT

Your CPA or tax accountant should be your go-to for tax preparation, planning, and compliance questions throughout the year.

Who do I recommend?



Abby Bailey

facebook.com/BaileyCPA
abby@baileycpallc.com
(509) 833-1179



Paris Gold

www.shedoestaxes.com
admin@shedoestaxes.com
(405) 367-4404

BANKER

Building a relationship with a banker can help you understand the account types and financing options available to optimally manage your business finances.

Who do I recommend?



Karina Bazaldua

www.key.com
(509) 829-5200



Jessica Johnson

www.bakerboyer.com
johnsonj@bakerboyer.com
(509) 576-5784

INSURANCE AGENT

Working with an insurance agent who understands your industry can help make sure you have the appropriate types and levels of coverage.

Who do I recommend?



Jedean Corpron

www.paynewest.com
jcorpron@paynewest.com
(509) 853-4237



Kyle Womach

www.paynewest.com
kwomach@paynewest.com
(509) 955-1307

ATTORNEY

Having an attorney on your financial dream team allows you access to someone who can draft, review, and help you understand legal documents for your business.

Who do I recommend?



David Mack

www.hawleytroxell.com
dmack@hawleytroxell.com
(509) 517-5008



Joanna Puryear

www.hawleytroxell.com
jpuryear@hawleytroxell.com
(509) 755-2072

WANT TO LEARN MORE?



I'm here to help when it comes to keeping your books clean and up-to-date, but I work with professionals in all sorts of roles. Need a referral not listed? I bet I know someone!

LINK IN BIO

nothing in this document should be construed as legal, tax, or financial advice

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