



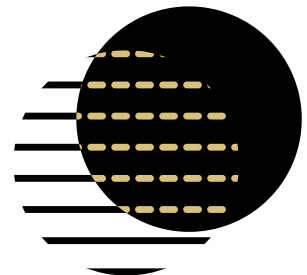
**TITAN**

# **Business Development Group, LLC**

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**business coaching | advisory | exit planning**

*titan: of prodigious size, strength or achievement*



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# About TITAN Business Development Group, LLC

**TITAN Business Development Group, LLC** is a professional, licensed, innovative, and energetic business development firm. Specializing in business and executive coaching and advisory services, we partner closely with small and medium size business owners and management to successfully create definitive, measurable, and sustainable results. From working together to improve operations, grow their businesses as well as challenge and crystallize visions, our goal is to help our clients become titans in their industries. Aside from working together to develop comprehensive, strategic solutions, we also offer results-driven training, including personal and professional development.



**The TITAN way** is much more than the right steps at the right times, it is also a highly collaborative, professional, respectful, and effective approach to impacting our clients in a fashion that empowers them to turn ideas into clear visions and transform those visions into reality. The TITAN way is about expanding one's definition of achievement and success - and surpassing the rest of the pack.

## Why Work with Us?



We work side-by-side with our clients as their experienced, trusted advisor and partner. Our goals include helping you resolve technical, organizational, and systemic issues, dramatically increase your bottom line, face the challenges of a dynamic marketplace, enhance productivity, be a stronger competitor, fortify your business so it can operate in your absence, plan for succession or sale, and in doing so, also stay focused on allowing you to live a higher quality life. Together, we will see to it that you and your business become *titans: ones of prodigious size, strength or achievement*, as aligned to your ultimate goals...guaranteed.



**As Certified Public Accountants and Chartered Global Management Accountants**, we bring an extensive knowledge of a vast variety of industries, best practices, strategies, and financial prowess to the table. Having worked with small startups, to medium size companies, on through publicly listed giants, we have solid, meaningful experience that we can transfer to your business.



**As Licensed, Professional Business Coaches**, we know very well that every business is unique. Each breathes a life of its own. We are well acquainted with and trained in highly successful models, methodologies, and proven techniques from top training institutions. Our work together will fit them as well as strategies from decades of remarkable, practical, professional experience to your business and goals, not visa-versa. **As Certified Executive Mastermind Coaches**, we bring the results of rigorous training from the global leader and authority in executive coaching to the table.



**We carry a CEPA designation**, the most highly regarded exit planning credential in the marketplace today. We know business. We are poised to assist you in identifying, protecting, building, harvesting, and managing the value in your business and assisting in its transfer or sale.



**As Consultants** we have a strong stable of associates and proven affiliates in a wide matrix of professional disciplines such as finance & accounting, human resources, payroll, sales & marketing, IT services, and more.

# Business Coaching

A study conducted by Michigan-based Triad Performance Technologies, Inc. (on the ROI of working with a business coach) cites a 10:1 return on investment in less than one year.

A Business Coach is an expert in various areas and processes of small and medium size businesses. He or she is a professional who studies what makes a business owner successful. In practice, a coach takes the time to understand the owner's business completely and provides systematic development strategies that help the owner reach his or her goals. A Business Coach works to develop the whole business on a continuous basis, in contrast to a consulting engagement where expertise is typically focused on a specific stand-alone issue. A good Business Coach is a skilled mentor in the development of areas such as leadership skills, marketing systems, sales training systems, development of customer service systems, human resources, and financial analysis.



At TITAN Business Development Group, LLC, we see our role as that of Trusted Advisor. The traditional advisors to business owners are usually accountants and attorneys. These professionals focus mainly on compliance. Accountants focus largely on financial matters such as ensuring that financial statements are prepared in accordance with GAAP and that tax returns are filed in accordance with tax regulations. Attorneys are focused on legal matters, ensuring the correct business entity is selected and the various legal issues encountered in the regular course of operations are dealt with in a timely manner. However, business owners do not meet with these advisors regularly. At Titan BDG, quite the opposite is true. We meet with our clients regularly (often weekly) and are always available by phone, video conference and email. During these ongoing, regularly scheduled meetings, business owners learn strategies and apply them to their business now. This constant contact ensures accountability and fosters dynamic, continuous progress, which creates incredible momentum! At Titan BDG we concentrate on moving the business to where the owner wants it to be.

*Business owners, sole proprietors, managers, supervisors, and others who normally work with a Business Coach are, first and foremost, open to being coached. Quite often they:*

- ☑ Seek measurable, sustainable change and empowerment.
- ☑ Need to address technical areas of their business.
- ☑ Want to take their business to the next level.
- ☑ Need to develop solid operating systems and procedures.
- ☑ May be preparing to sell or turn their business over to a family member.
- ☑ Work too hard (often, 50–60 hours per week or more) for too little gain.
- ☑ Find themselves procrastinating or avoiding certain duties.
- ☑ Feel the need to talk with someone with deep business experience and know-how.
- ☑ Are stressed trying to continually shoulder the challenge of producing new ideas to build their business beyond where it is today.

From one-on-one coaching to business effectiveness workshops to mastermind groups to new manager training and more, we have services to fit any budget and the burning desire to help you grow your business and see to it that you become a business titan – “one of prodigious size, strength or achievement”!

# Executive Coaching

## Personal Executive Coaching



new operating frontiers.

Today's volatile marketplace presents immense challenges for the twenty first century executive. In unprecedented fashion, executives find themselves having to operate within tighter constraints and under closer scrutiny. Added to this is the hard fact that organizational cultures are evolving more rapidly than ever in response to

TITAN Business Development Group, LLC's personal executive coaching provides you, the executive leader, with highly individualized and confidential attention. An increasing number of busy executives are engaging their own coaches. In fact, many companies, recognizing the tremendous benefits, even provide reimbursement.

Whether you need to utilize your executive skill sets more effectively, enhance attitudinal development, or take your organization to the next level, personal executive coaching will assist you in meeting the challenges that face today's executives.

### *Example Benefits and Advantages:*

- ▲ A much sharper focus    ▲ Increased business effectiveness and measurable, enhanced performance
- ▲ More efficient prioritization, time, and resource delegation skills    ▲ Superior leadership development
- ▲ Heightened creativity and strategic goal setting capabilities    ▲ Business relationship management
- ▲ Plan execution; identifying weaknesses and producing solid results    ▲ Personal branding
- ▲ Greater clarity of purpose and direction    ▲ Developing and deploying team building skills
- ▲ Better understanding of your optimization patterns and inherent needs – DISC based Assessments.
- ▲ Development for and transition to the next level    ▲ Exploring and removing obstacles to promotion

## Corporate Executive Coaching

Organizations frequently engage our corporate executive coaching services to fast-track high potential people in preparation for executive position placement. Corporate executive coaching improves organizational alignment and function by working with key individuals, teams, and tier levels. The unique coaching processes and tools which we employ integrate the development of attitudes, skills, goal planning and achievement into a powerful process that results in a more effective harnessing of the potential which already exists in organizations and their people. The process is transformational in that it focuses on long term development and sustainable future result outcomes.



**Make no Mistake: This *\*is\** the Dynamic Competitive Edge!**

TITAN Business Development Group, LLC's consulting niche is comprised of a multidisciplinary team of top-tier professionals who offer a unique combination of operational experience and strategic consulting expertise to provide unprecedented value to our clients. Our goal is to provide our clients the competitive edge necessary to be leaders in today's marketplace.

## Business Planning

A business plan is critical to the success of any venture and is an indispensable management tool. Planning will help you improve efficiency, productivity and competitiveness, ensuring your business is well-positioned to meet the challenges and opportunities ahead. We can assist you in developing a written and detailed overview of where your business is, how it is positioning itself, where it wants to go and how it is going to achieve its goals.

## Business Analysis

Our objectivity, coupled with sophisticated techniques and tools, allows us to analyze your strengths and weaknesses, identify opportunities for increased profitability and supply the tools to make your business even more successful.

## Business Processes and Systemization Strategies

Especially in today's dynamic environment, business processes need to be scrutinized and developed in such a fashion that they are concise and dependable, yet flexible enough to shift with your enterprise's evolving demands. Our experienced team can assist you in the development, implementation and monitoring of these processes. Systemization strategies will help insure consistency and form a structure that allows your business to run in your absence.

## Management Consulting

Organizations hire the services of management consultants for a number of reasons, including gaining external and objective advice, access to the consultants' specialized expertise, or simply as extra temporary help during a one-time project. Our consultants may also provide organizational change management assistance, technology implementation, strategy development, or operational improvement services.

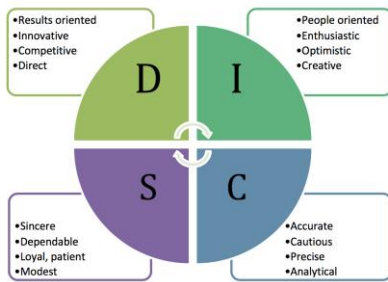
### Our Team and Strategic Alliances also provide consulting in:

√ **Marketing**    √ **Environmental Engineering**  
√ **Information Systems**    √ **Human Resource Development**  
√ **Sales Force Development**    √ **Cost and Inventory Management**  
√ **Financial Analysis**    √ **Bookkeeping**    √ **IT Services**    √ **And More.**

**Give us a call today to discuss your needs and to explore working together.**



## INDIVIDUAL ANALYSIS



DISC Individual Assessments are designed to provide information that makes an impact, is actionable and, most importantly, has a positive impact on performance. The Individual Assessments are self-assessments that identify the strengths and development areas of an individual. What makes DISC different from other assessments is that it is able to measure the hard-wired behaviors to exclude the impact of the environment. In practice this means that the results show who the individual actually is and not just what the person thinks he/she needs to be in the existing environment. As a result, the report identifies the true strengths and development areas to allow for real

performance improvement. Their success is based on their strong ability to provide information to make better decisions.

**We have a number of Assessment Options available to ensure you have the information you need:**

- |                                     |                         |                               |
|-------------------------------------|-------------------------|-------------------------------|
| ▲ Information Technology Assessment | ▲ Sales Assessment      | ▲ Training Assessment         |
| ▲ Team Member Assessment            | ▲ Leadership Assessment | ▲ Customer Service Assessment |
| ▲ Management Assessment             | ▲ Project Assessment    | ▲ Administrative Assessment   |

**Some of the most common applications for Personal Analysis in organizations worldwide are:**

- Leadership Development • Organization Development • Communication and Interaction Skills Training
- Sales training and Sales Management Training • Customer Service Training • Coaching

## TEAM ANALYSIS

From CEOs to front line employees, Team Analysis is a powerful tool that has many applications and yet is easily understood. Team Analysis provides a clear, easy-to-use framework to understand complex issues quickly, to solve problems and to improve performance. It also presents a safe environment to discuss challenging topics productively. Team Analysis provides the big picture that enables decisions to be made with confidence.



Team Analysis is a tool that can combine all the individual assessment results into one report. It shows the team dynamics, the strengths and development areas of the team, and illustrates how the team members are adjusting their behaviors in the existing work environment. Team applications are among the most popular uses of the tool and Team Analysis is capable of assessing an unlimited number of individuals. As a result, it enables our clients to perform various, more complicated analyses very cost effectively. Some of these applications include identification of the effective behaviors (leadership, management, sales and customer service), succession planning and strategic decision making.

**Once the participating individuals have completed a brief Personal DISC Analysis questionnaire, you simply tell us which members you wish to include in the report. Reporting options include:**

- Maps to identify team makeup ▲ Maps to identify style adjustments ▲ Team Scorecard ▲ Team Roles

Titan Business Development Group, LLC is trained and licensed as Industrius CFO ProAdvisors in the use of its Business Intelligence analytical tools and databases – an extremely powerful business intelligence solution that is well respected across the globe. This impressive tool was originally developed in conjunction with the Ewing Marrior Kaufman Foundation, which is often referred to as the world's largest Foundation devoted to entrepreneurship.



Use of this powerful business intelligence solution helps our clients make insightful, superior decisions based on the largest and most reliable financial benchmarking database of privately held companies available. We support your decision-making processes with timely, relevant, easy to retrieve and readily presentable financial information and benchmarks. We have a passion for supplying dependable business intelligence and expert advice to make you and your business more successful.

Its dataset is unique, offering financial insights not found anywhere else. It covers more than 1,000,000 mostly privately held companies that do not publicly disclose their financial information from over 2,600 different industry groups as classified by either SIC (Standard Industry Classification) or NAICS (North American Industry Classification System). Benchmarks present the most important Key Performance Indicators derived from the dataset that are critical to understanding and evaluating the state of, and the prospects for, any business based on its financial situation.

Tools and reports can be used to present industry analysis statistics or to display side-by-side comparisons of an individual company and industry benchmarks of an entire industry of similarly sized entities.

Our recommendations are offered to support decision making and are based on years of expert experiences that have found insightful patterns and promising solutions which apply to firms of similar financial health across almost all industries.



## A few analysis examples:

The **Ratio Benchmarking Analysis** section of your Report provides you with a comparison of your company to a similar size company in your industry using common-size financial statements and key standard ratios.

The **Return on Asset Investment Analysis** section of your Report lets you examine your ROAI, to develop strategies for improvement. Return on Asset Investment is the major measure of the earnings power of a business. It also provides a measure of the competitiveness of your firm.

The **Net Balance Position Analysis** section of your Report uses NBP, the modern approach to estimating the cash liquidity of a business. This section of your report will show you the ratios that affect your NBP and suggests ways to improve it.

The **Sustainable Growth Rate (SGR) Analysis** section of your Report provides you with an estimate of the growth rate as a percent of sales that you can afford given your capitalization structure without developing cash problems.

The **Valuation** section of your Report page provides estimates of the value of your firm. The valuation of a business is an important measure of management success and it will give you an indication of the value you are creating for owners over time.

Titan Business Development Group, LLC can also use powerful **financial modeling (what-if scenarios)** to quickly show you the effects of different strategic scenarios, helping to guide your business decisions in a distinctly measurable way.

# Business Exit Planning

Your relationship to your business has a life cycle and as a business owner, you must face one inescapable fact: at some point in time, you will cease to be the owner - either by choice or by force of circumstance. The crucial question is whether the process will be on your terms and leave you wealthy and satisfied or disappointed and regretful. Whether that transition is successful is up to you and we can help you unlock the wealth trapped in your business prior to your imminent exit and create a future and legacy that you deserve, maximizing the value of your most significant asset, harvesting those riches. Of course, there are those circumstances where you are certain you are looking to go to market now and our expert CEPA (Certified Exit Planning Advisor) will navigate that pathway with you as well.

*“Exit planning isn’t necessarily about exiting soon, it’s also about having an end in mind to ensure you are effectively improving the value of your business now, at this moment.”*

## What is an Exit Plan?

An Exit Plan is a comprehensive road map that helps business owners successfully exit a privately held business. An Exit Plan asks and answers all the critical questions that you must consider when exiting your company. It covers all the personal, financial, legal, tax and estate planning areas related to the exit. It also helps you consider various exit options, evaluate the pros and cons of each option, and select the right one for you.

## Consider these EPI State of Owner Readiness Survey Results:

- Only roughly 70%-80% of private business even culminate in a successful transfer/sale!
- Around 75% of exited owners feel remorse over their exit within the first year.
- Two-thirds of owners are not familiar with all their exit options
- 78% have no formal transition team; 83% have no written transition plan; 49% have done NO planning
- 93% have no formal life-after-business plan
- 40% have no plans in place to cover illness, death, or forced exit
- Half of all owners need the company to remain profitable during and after the transition plan, yet 86% have not taken on a strategic review or a value enhancement project
- 56% felt they had a good idea of what their business is worth, yet only 18% have had a formal valuation in the last two years

## When to make an Exit Plan?

All business owners should have an Exit Plan. When you get into a business, you should already know what you want to get out of the business. It is no coincidence that venture capitalists always ask entrepreneurs about their exit strategy before considering an investment.

If you do not have an Exit Plan, it is probably time to start thinking about one. You should formalize an exit plan *ideally* 3 to 5 years before your actual exit. This generally leaves enough time to substantially further build the value of your business, especially if is not yet at the desired value level. We can show you which activities contribute harvestable business value beyond what is based on revenue numbers (HINT: this can be about another 80% of the sales value).



# Accounting

## Accounting Isn't A Science; It's An Art.

We know you deserve more than just someone who's good with numbers. Expert accounting takes imagination and skill. We take pride in our creative approach to problem solving. By maintaining a proactive role in your finances, we can help you anticipate events and identify the differences between an opportunity and a pitfall.

## We Strive for Your Trust.

We strive to become an integral part of your circle as a trusted advisor, confidant, and friend. Our clients choose us for our technical expertise and specialized knowledge. They stay with us because we serve as their partners, achieving their financial goals.

## Providing Value and Knowledge Are Key.

We are dedicated to providing you with unparalleled value and knowledge. Value comes in planning for your future, not just reporting on the past. We will help you look ahead to find the opportunities available in an ever-changing environment. When it comes to our professional services, a core principle is to provide the comprehensive knowledge and experience of our firm, and to do so in a way that also empowers you as you move forward.

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Utilizing an extensive knowledge base of financial and business services, we work with your financial (and non-financial details) to make big-picture recommendations. For your day-to-day operations, we offer services like accurate bookkeeping and general ledger review, helping you maintain meaningful financial and operational information, and perform activities such as internal control assessments to protect your business from within. For broader decisions affecting your business' future, we can assist you with planning for your cash flow and financing needs and estimating costs through budgeting and forecasting.

Our clients include individuals, partnerships, not-for-profit entities, small businesses, and larger organization, from startups to more established entities, across a variety of industries. We strive to keep your business ahead of the game by acknowledging the unique situations surrounding each business and by being mindful of the competitive and economic trends that directly impact your business.

Regardless of the type of engagement, the size of your business, or your industry, we will be aligned as your business partner, helping you make informed decisions to protect the legacy you have worked so hard to build. From start-ups to established enterprises, businesses rely on accurate and insightful financial information in order to maintain profitability and capitalize on new opportunities. Our accounting services steer you closer to these goals.

### Our services include, but are not limited to:

- |   |   |
|---|---|
| ▲ Bookkeeping (monthly, quarterly, or annual) | ▲ Cost containment & Cash Flow management |
| ▲ General Ledger maintenance and preparation  | ▲ Controller services                     |
| ▲ Financial Statement generation and analysis | ▲ Financial Analysis                      |
| ▲ Reconciliations                             | ▲ Metrics development                     |
| ▲ Accounting system setup and support         | ▲ Sales and Use Tax filing assistance     |
| ▲ Accounting assistance and training          | ▲ Tax planning                            |
| ▲ Financial budgeting and forecasting         | ▲ Personal Financial Statements           |

# Nonqualified Deferred Compensation Plans

## Are you getting everything you need from your Third-Party Administrator?

Changes in federal legislations have increased the complexity and reporting requirements for Nonqualified Deferred Compensation Plans and the cost of noncompliance is significant. As a Plan Sponsor, you want to know that your plan is well tended to.

TITAN Business Development Group, LLC offers complete, flexible, cost-effective solutions with a personal touch.

We represent a vast number of Nonqualified Deferred Compensation Plans of varying sizes and complexities. A respected provider of TPA services, TITAN Business Development Group, LLC combines experience with technology to bring state-of-the-art plan administration to our clients.

### **Recordkeeping and Reporting Services:**

KEYSOP™  
Specialists

Purchase and Grant  
Translations

Option and Deferral  
Agreements

Substitutions and  
Restatements

Earnings Allocations

Exercise/Payout  
Calculations

Trade Directives

Distribution  
Assistance

Plan Sponsor and  
Individual Participant  
Statements

Online Access to  
Valuation Statements

Customizable  
Reporting Formats

### State-of-the-Art Reporting System

Our proprietary Reporting System is designed to respond quickly to your needs and new reporting requirements. Concise, customized, easy-to-read statements outline all activity, elections and valuations at a glance. Secure online access to Statements of Activity is offered to Plan Sponsors and Participants.

### Cost Savings

Our solutions eliminate the need for in-house recordkeeping. Not only do you realize administrative cost savings, but also eliminate human error associated with redundant activities and manual entry.

### Proactive Team Members

By working closely with you, your legal counsel, trustees, brokerage firms and other advisors, we ensure that your Plan suits your needs and remains compliant with current regulations.

### Personal Attention

Regardless of the size of your Plan, we provide prompt, dedicated and efficient attention to all matters at hand. Personal service and system flexibility let us adapt quickly to meet the particular needs of your specific Plan or Arrangement.

### Safety and Security

Your Plan contains a great deal of confidential information. You can be assured that all data onsite is securely protected physically, and access-protection measures are in place as well. All offsite information resides on dedicated, double firewall protected servers with the latest complex encryption and security features in place.

Most businesses share some similar goals that include turning a profit, generating cash, and increasing company value, binding operational performance to company metrics and developing effective strategies designed to help the company grow. Enter the CFO (Chief Financial Officer)



At one time, it was mainly larger corporations that used dedicated CFO's. Today, particularly as a benefit of technology, much smaller companies regularly seek to use these services as well. However, not all businesses can afford to directly hire the professional expertise they need. That is why many businesses today are turning to outsourced/virtual CFO services as a cost-effective way to procure professional financial management services.

Titan Business Development Group, LLC's outsourced/virtual CFO service provides significant value to business owners of all sizes by delivering experienced financial management at a fraction of the cost of a full time CFO, on an ongoing part-time, temporary or project-based basis.

## Just some of the benefits you can expect:

- A trusted advisor/part time CFO who is also A Certified Public Accountant and a Chartered Global Management Accountant, with diverse experience
- An independent viewpoint. We bring a seasoned yet fresh viewpoint to bear on a company's difficulties and struggles and help solve problems that your in-house staff may be too close to, to see solutions.
- Better understanding of the financial condition of your business, so you have fewer surprises and more control over your finances
- A readily available sounding board to help you with those tough business decisions and help you clarify your business plans
- Advise on the best path for growth, supported by financial analysis to support recommendations
- The comfort from knowing that a seasoned financial professional is overseeing, protecting and constantly improving the financial side of your business
- A professional who establishes strong financial controls in your business to enhance operating efficiency and increase profits
- Streamlined accounting systems. Out-of-date processes and antiquated methods can greatly hinder the cost efficiency of any business, department or position
- Manage financial performance by setting metrics - develop KPI's (Key Performance Indicators) and help you compare yours to your industry's as well
- Accurate Financial Statements. You will also typically see a direct reduction in tax and accounting fees – and many others that we work on to reduce or eliminate
- More time to focus on new services, new customers and other core business issues



You can be certain that Titan Business Development Group, LLC will work alongside you, the business owner, your management team and other key advisors, rolling up their sleeves and taking a dedicated hands-on, custom approach to your engagement.

## A Few Testimonials

*"(TitanBDG) brings to the coaching model that inner sense of knowing what's behind the numbers, how they should look and what a business owner needs to do to get them there. (Their) methodology transcends the simple compliance strategies of financially based peers and results in what can only be described as sound business effectiveness. Excellence is a given here, as it should be and so rarely is."*

Brendan Cunningham, President and Owner - Excelleron

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*"Working with Titan was one of the best decisions I've made! Their knowledge of business, law, accounting, and marketing have helped me get my business off the ground. Before finding Titan, I had spoken to a handful of "accountants" and "business coaches" that were very unsure of how to execute my goal of running both a for profit and a not-for-profit organization. Titan was 100% sure of my goal and was able to help in coaching, accounting, and execution. They were a joy to work with. Not only are they very well versed, but they also held me accountable, and have a wonderful sense of humor. An absolutely wonderful experience, and an investment worth making in yourself, and in your business."*

Kimberly M. Spair, M.C.D CCC-SLP/L – Reclaimer's of Health, LLC and Integrative Beginnings

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*"Titan Business Development Group did an incredible job of managing ULI's program. The deliverable was always exact and on time. The training and advice that they provided to the organization was very well done. We could not have managed this program without Titan."*

Michael Terseck – CFO, Urban Land Institute

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*"We have worked successfully with Titan Business Development Group for a number of years and have enjoyed a productive relationship. They have been highly responsive, professional, and proactive. We look forward to continuing our association."*

Peter Lee – BIC Corporation

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*"I find Titan Business Development Group detailed, client oriented, with unstoppable energy and an abundance of caring for their clients and their clients' goals. They know how to get them to achieve and to enjoy the process. I have been able to refer my clients to Titan BDG without hesitation and with absolute confidence."*

Richard Silverlieb, Esq. – Principle, AV® Preeminent™ rated Attorney at Law

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*"True professionals. Time and again, we rely on their information. They are timely and responsive, and a pleasure to work with. I wish all our associations worked this smoothly. I highly recommend their firm."*

Regina Ryan, Sr. VP – American Financial Group, Ltd./IFG Russell Advisors

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*"We engaged with Titan Business Development Group for various services and they were outstanding. They are superb communicators with the ability to make complex concepts easy to understand. Titan is proactive and our organization successfully relied on their expertise and competence."*

Julie McGovern, VP – Chilton Memorial Hospital