



Agency owners under \$750k in revenue must take a “hands-on” approach in all aspects of their daily agency life. Constantly focused towards working **IN** the business, that working **ON** the business takes a backseat. **Until now. Learn the insider strategies of larger agencies through the AgencyCFO Executive Academy™.**

## The AgencyCFO Financial Fluency™ Course

In the world of insurance there is training for every role from receptionist to executive – every role **except** accounting/financial. This is a critical gap – especially for growing agencies. Without access to strategic financial guidance, there is a tremendous learning curve for agency owners. Where there is a strategic gap, there is the AgencyCFO™ program ready to fill it!

The AgencyCFO Executive Academy™ will bring together growth-minded agencies through a three-month, cohort-based learning course. Agency owners will be able to adopt the practices of a “Mid-Agency Mindset™” at a small fraction of the cost for the full AgencyCFO™ program.

## As part of the AgencyCFO Financial Fluency™ Course, agency owners will receive:

- Tailored tools from our AgencyCFO Toolbox™ delivered virtually through five, live training sessions
- Direct access to expert guidance through live Q&A
- Online access to all provided materials
- Open email access to the team of experts
- Access to our private, alumni-only, LinkedIn group
- The ability to “buy” more individual time at a group reduced rate
- Incentive and guidance to grow into the various AgencyCFO™ programs

The AgencyCFO Executive Academy™ is a resource center for agency owners to have access to the guidance and tools needed to strategically work on their agency’s future. You no longer have to go it alone.

## Meet the AgencyCFO™ Experts



DON



ROE



CAYLA

Facilitated with open dialogue between AgencyCFO™ experts and agency owners, members will be equipped to control their agency’s financial trajectory.

Contact us today at

[acfoexecacademy@rdadvisorygroup.com](mailto:acfoexecacademy@rdadvisorygroup.com)

for more information on how you can join the next Academy cohort!



# STARTING SPRING 2022

## AgencyCFO Financial Fluency™ Course

**REGISTER HERE!**



### VIRTUAL COURSE DATES

**4/14/22 2-3PM EST**

Session 1:  
*Meet the Cohort*

**4/21/22 2-4PM EST**

Session 2:  
*CFO Foundations*

**5/05/22 2-4PM EST**

Session 3:  
*Planning for Success*

**5/19/22 2-4PM EST**

Session 4:  
*Measuring for Success*

**6/02/22 2-4PM EST**

Session 5:  
*Best Practices & KPIs in Action*

**06/16/22 2-4PM EST**

Session 6:  
*Trust Accounting & Cash Flow*

**6/23/22 2-4PM EST**

Session 7:  
*Moving Forward*

### WHO CAN ATTEND?

Agency Owners with at least 2% ownership stake.

**BONUS:** Each agency owner within a Fluency cohort can have up to 2 employees join them! Note, **Agency owners must attend all sessions** and cannot send the employees in their place.

### REGULAR PRICING

**\$2,500**

- Must be paid in full at the event.
- Yes, credit cards ARE accepted.
- No refunds after the first session.
- \$2,000 credit towards transition to other AgencyCFO™ packages.

### AGENCYCFO PREFERRED PARTNER PRICING

**\$2,195**

*\*Ask an AgencyCFO™ Expert if you qualify!*

## Don't forget...

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### HERE'S WHAT OUR **ALUMNI** HAVE TO SAY ABOUT THEIR **EXPERIENCE:**



#### **Jeremy Powers**

**Owner of Powers Insurance Experts**



"Starting from scratch and being good at one thing... sales helped me to survive my first two years as an independent agency owner. AgencyCFO™ has given me so much peace of mind as I now feel like a true business owner. Knowing what it would look like financially to hire a new staff, how my agency compares to others my size, and knowing industry leaders helped me build this plan has me ready to crush 2022!"



#### **Rob Bowen**

**Founder & CEO of Patriotic Insurance Group**



"I honestly had zero expectations. I didn't know what I didn't know. The last 6 weeks of the course have been eye opening to me. What I have decided as an agency owner is to get my financial stuff in order so that as I grow, I won't have this problem to unwind as I get down the road. I heartily recommend RD Advisory!"

**Click the video to listen more about Rob's experience with the AgencyCFO Executive Academy™! You won't want to miss his awesome insight.**



<https://youtu.be/-jgt5s9Z6xM>

To join us at an upcoming course, check us out at [www.agencycfo.com](http://www.agencycfo.com) for our cohort schedule.