

# Jennifer Goldman Consulting

EMPOWERING PROFESSIONAL SERVICES FIRMS TO DRIVE CLIENT GROWTH,  
OPTIMIZE RESOURCES AND HAVE CLEAR BUSINESS PLANS AND PROCESSES



Jennifer Goldman, CFP®

## About Us

### **Business Transformation Advisor** ♦ **Process Designer** ♦ **Certified Financial Planner**

JGC has transformed hundreds of professional services firms into profitable, higher growth businesses through the optimization of resources, marketing, tech, processes, and strategic business planning.

### **Business Management Expert** ♦ **Insightful Listener** ♦ **Trusted Advisor**

JGC assesses what needs to change, why, and guides you through every step of implementation. The benefit is higher profitability, more cohesive staff, attraction of new business, and clarity in taking your business forward.

### **Contributing Author**

*Technology Tool for Today's High Margin Practice*, by David J. Drucker, MBA, CFP(R) and Joel P. Bruckenstein, CFP(R)

## Services

**Business Planning** – goal setting, prioritization, timeline, cost and resource allocation to clarify 1-2 year goals and action plans

**Business Modeling** – conducting P&L analysis and time tracking

**Process Design and Implementation** – redesigning processes to maximize the use of staff, providers, and tech while improving client and staff experience

**People / Staff Recalibration** – defining roles, capacity, career paths, and strategy for hiring and outsourcing

**Tech Integration Refinement** – produce visual charts and recommendations for major areas of the business

**Marketing Assessment** – provide quick-win marketing improvements

## Benefits of Working With JGC



## What Others Are Saying...

*"Laser focused, professional, engaged, proactive."*

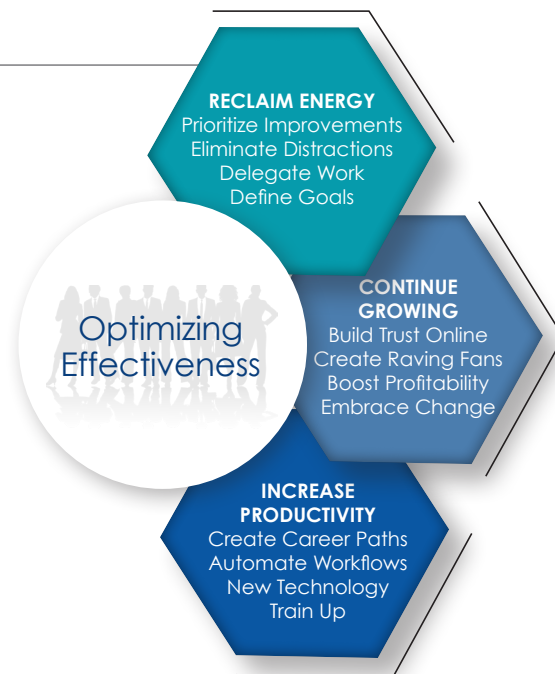
– R. Dragotta, Private Portfolio Partners, LLC

*"Jennifer knew her stuff and was sincere and professional..."*

– A. Nasser, AltruVista

*"Jennifer ... brought... unique and interesting ideas and was a great sounding board as we considered different options."*

– P. Herrington, Pekin Singer Strauss Asset Mgt.



## CLIENT RESULTS

**Revamped** processes, roles and technology to deliver savings of \$600K to MI firm, while growing revenue by \$5M, within two years.

**Transformed** operations, roles, and staffing, formulated exit strategies and orchestrated relocation driving \$800K in revenue.

**Created** processes, identified tech platform, and hired staff for launch of entrepreneurial venture which attracted \$75M in assets with 45% margins, exceeding top industry performers by 10%.

**Instituted** time-saving processes, trained up Operations Manager to COO, elevated valuation, and allowed firm to attract \$50M AUM, \$500K revenue and a lucrative merger offer.