

# BECOME YOUR OWN BRAND (BYOB<sup>©</sup>)

## *Consolidating All Your Personal Finances with QuickBooks<sup>®</sup>*

### Personal Financial Fears

- ✓ **Do I have enough money:**
  - ...in my bank account?
  - ...to pay my credit cards?
  - ...to pay off my car loan or lease
  - ...to fund my 401(k)?
  - ...take a real vacation?
  - ...to put my children through college?
  
- ✓ **Do I know:**
  - ...all the accounts in my name?
  - ...when I need to pay what?
  - ...where I keep all my financial records?
  
- ✓ **How could I:**
  - ...survive an IRS audit?
  - ...afford health care costs
  - ...actually retire
  - ...refinance my home



### Solution: Set up in QuickBooks

- ✓ **Confidence being your own brand:**
  - Know you have complete financial records in one place!
  - Produce all the necessary documentation for:
    - Financial Advisors
    - CPAs
    - Refinance banks
    - and more!
  - Update all your financial records each month with ease
  
- ✓ **Organization being your own brand:**
  - Set up all your bank and credit cards as separate accounts
  - Trace the balances of all loans, mortgages, and other debt
  - Create clear paper and computer files for all your finances
  
- ✓ **Support (you are not alone):**
  - Access to a certified QuickBooks ProAdvisor to answer questions
  - Have your questions answered rather than letting them fester
  - Monitor all accounts on a monthly basis

### R. M. O'Hanlan Consulting

- ✓ **Empowerment:**
  - Learn to do as much of your financial updating as you wish; we will do the rest.
  - Compassionate training to manage your money
  - No question is ever too stupid
  - Transfer plans from your financial professionals so you can see them become reality
  - Services on-site, online, and in-house
  
- Peace of mind:**
  - The "dark unknowns of your money" are gone
  - Breathe and sleep peacefully
  - Live your life instead of fearing it!
  - Take pride knowing you are standing on the financial foundation you created from your fears!

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