



FINANCIAL POISE WEBINAR ONE SHEET
THE START-UP/SMALL BUSINESS ADVISOR 2022
All episodes air at 1:00 PM CST

ABOUT THIS SERIES

Most startups are not destined to become billion dollar unicorns. Most, in fact, will fail and most of those that survive may never be more than small businesses. Whether and to what extent a startup will be successful depends on many factors. One set of factors is the foundational pillars on which the company is built, and includes things such as the company's capital structure, financial controls, human capital, management/founder talent, market niche (and barrier to entry), financing growth, managing burn rate, and marketing functions. This series explores each of these topics, giving startups, entrepreneurs, and their advisors useful tools and insight into how they can build a foundation for success.

As with every Financial Poise Webinar, each episode is delivered in Plain English understandable to investors, business owners, entrepreneurs, and executives without much background in these areas, yet is also valuable to attorneys, accountants, and other seasoned professionals. And, as with every Financial Poise Webinar, each episode brings you into engaging, sometimes humorous, conversations designed to entertain as it teaches. Each episode in the series is designed to be viewed independently of the other episodes so that participants will enhance their knowledge of this area whether they attend one, some, or all episodes.

About Episode #1

The Very Basics - Forming the Business

February 15, 2022 at 1:00 PM CST

So, you are an entrepreneur and want to start your own business (or you are an attorney, accountant, or other professional advisor working with one). One of the first decisions required is to choose a legal structure for the business and the jurisdiction of entity organization. What factors should be taken into consideration prior to selecting a legal structure and jurisdiction? Does a sole proprietorship, partnership, limited liability company or corporation (C- or S-corp) make the most sense? This webinar focuses on business formation and the pros and cons to the different legal structures, and includes tips on how to keep one's personal assets safe from the claims of future creditors of the business.



This webinar is delivered in Plain English, understandable to you even if you do not have a background in the subject. It brings you into an engaging, even sometimes humorous, conversation designed to entertain as it teaches. And, it is specifically designed to be viewed as a stand-alone webinar, meaning that you do not have to view the other webinars in the series to get a lot out of it.

About Episode #2

Raising Capital- Negotiating with Potential Investors

March 15, 2022 at 1:00 PM CST

Every business needs capital (cash) to fund its activities. But not all capital is created equal. At the most macro level, a business can raise cash by selling equity or by borrowing (and these alternatives are not by any means mutually exclusive).

This webinar explains the different types of capital available to fund a startup; how to identify potential funding sources; how to evaluate competing funding proposals; and how (and when) to negotiate financing terms. In addition, this webinar will address the kinds of investors for entrepreneurs to consider for their start-ups.

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About Episode #3

What Every Founder/Entrepreneur Must Know

April 26, 2022 at 1:00 PM CST

Congratulations. You are a founder of a company and you have just been given an hour to ask several experts anything you want about the subject. Some questions will certainly focus on IP, since intellectual property is so important to so many businesses. Some questions will touch on outsourcing- perhaps of manufacturing, perhaps of certain other functions. Formation, capital raising, and HR are also fair game. And since the panel includes two attorneys,- you can be sure that the conversation will cover both the business and legal aspects of the various topics discussed. The panel will also discuss planning for incremental growth; and, while pandemic continues, the availability of PPP loans and governmental assistance.



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About Episode #4

Turning an Idea or Product Into a Business

May 24, 2022 at 1:00 PM CST

Building the infrastructure of a business around a product or service requires detailed focus upon items that are not intuitive.

An early decision which founders must make is the selection of a legal entity (LLC, Partnership, S Corp, C Corp, Non-Profit) for the business. Another critical action item is to consider steps to protect turf by keeping copycats away, to the extent possible (i.e. with copyrights, trademarks, patents, non-disclosure agreements, among other things). Hiring and incentivizing employees and finding a way to finance the business are examples of other key areas that founders need to get right. This webinar provides an overview of these topics and shares some best practices with regard to them.

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