

Simplifying sophisticated financial planning for small business owners and their families.

A FREE LOCAL RESOURCE / BY BUSINESS LEADERS. FOR BUSINESS LEADERS.

You build the dream. Keep your family's future in the picture.

You are creating jobs, serving customers and looking after your team. Time is limited. Your family's financial picture should not suffer while you build the dream.



WHY WE CARE / THE GAPS BETWEEN GOOD DECISIONS CAN BE COSTLY

War Room is a free local resource being built by business leaders, for business leaders and their families. We want to make sophisticated financial questions easier to understand - and help the right people see the whole picture.

Your CPA, attorney, insurance professional and financial advisor can each do excellent work. But when tax, retirement, investment, protection and business decisions are considered separately, coordination gaps can go unnoticed.

**The cost of an overlooked connection can be high.
Clarity starts with knowing which questions to ask.**

HELP US UNDERSTAND OUR LOCAL LANDSCAPE

What do local owners need? What gets in the way? Where could practical tools and coordinated conversations add real value? Your answers will help us shape resources around the community we serve.

10

multiple-choice questions

< 3 min

designed for your schedule

250

owner voices is our goal

NO SALES PITCH. NO PURCHASE OR APPOINTMENT REQUIRED.

Turn over for the planned January 31 deadline, participant book offer and proposed prize bundle.
Free educational resources; professional engagements are separate. Review edition - survey launch pending.

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YOUR INVITATION / THE DEADLINE. THE THANK-YOU. THE ASK.

PLANNED ENTRY DEADLINE

JANUARY 31, 2027

YOUR GIFT / EVERY QUALIFIED LOCAL PARTICIPANT

A copy of Sellable. Our thank-you for your time.

Practical insights on business value and your next chapter. This planned participant gift is separate from the drawing bundle. Local address and final eligibility apply.

PLUS A CHANCE TO WIN / FIVE WAYS TO MOVE YOUR BUSINESS FORWARD



Proposed prize bundle • Details and rules pending

THE ASK / HELP SHAPE A RESOURCE FOR OUR COMMUNITY

10 questions. Less than 3 minutes.*

WarRoomOcala.com/input

Then explore the free Retirement X-Ray Demo.
No sales pitch. No purchase or appointment required.



Seeking local owners: 5+ employees, 5+ years in business, \$500K-\$25M annual gross sales.

*Designed for under 3 minutes. Please share with 2-3 local owners. Goal: 250 owner voices.

REVIEW EDITION - PUBLIC SURVEY QR NOT ACTIVE. Survey and entry are not open. Gifts, providers, eligibility and official rules pending; drawing date/time to be announced. Bundle image is illustrative. No purchase or appointment required. Book offer requires a local Ocala / Marion County business address.

352-766-1994.