



FREE  
GUIDE

HOW TO BUILD YOUR

# Financial *Dream Team*

[www.synergistaccounting.com](http://www.synergistaccounting.com)

# Welcome!

When it comes to your business finances, you can't do it **all** alone. To build a sustainable business, you need a team of trusted advisors on your side.

We're going to break down the roles of each of the members of your financial dream team and share a few people you may want to interview for your business!

## DREAM TEAM OVERVIEW



BOOKKEEPER



CPA



ATTORNEY



INSURANCE AGENT



BANKER



FINANCIAL ADVISOR

# Due diligence

Before trusting someone to be an advisor for you and your business, make sure to do your due diligence and ensure they're going to be a good fit!

## **DUE DILIGENCE CHECKLIST**

Ask about their experience serving businesses in your industry

Read reviews and ask your peers for their recommendations

Don't be afraid to interview multiple options and request quotes

Double-check their licensure and certifications

Carefully review their service contracts before signing

# CPA/Accountant

Your CPA or tax accountant should be your go-to for tax preparation, planning, and compliance questions throughout the year.

## Who do we recommend?



**Raj Prabhu**  
***RLP Tax & Accounting***  
www.rlptax.com  
raj@rlptax.com  
425-462-1040

# Attorney

Having an attorney on your financial dream team allows you access to someone who can draft, review, and help you understand legal documents for your business.

## Who do we recommend?



**Justin Park**  
***Romero Park P.S.***  
www.romeropark.com  
jpark@romeropark.com  
425-450-5000

# Business Insurance

Working with a business insurance agent who understands your industry can help make sure you have the appropriate types and levels of coverage.

## Who do we recommend?



**Fernando Guaren**  
**State Farm Insurance Agent**  
www.insurewithfern.com  
fernando@insurewithfern.com  
425-455-2227

# Health Insurance

The right health insurance agent who comprehends your specific healthcare needs can ensure that you have the appropriate coverage necessary for your team's well-being.

## Who do we recommend?



**Theresa Baker**  
**Baker Insurance Group**  
www.bakerig.com  
theresa@bakerig.com  
425-292-0004

# Banker

Building a relationship with a banker can help you understand the account types and financing options available to optimally manage your business finances.

## Who do we recommend?



**Emily McPhetridge**  
**First Financial NW Bank**  
[www.ffnwb.com](http://www.ffnwb.com)  
[mcphetridgee@ffnwb.com](mailto:mcphetridgee@ffnwb.com)  
425-358-0053

# Financial Advisor

Financial advisors specialize in providing comprehensive financial advice, retirement, and investment guidance tailored to your business' specific needs and goals.

## Who do we recommend?



**Max Baer**  
**Merit Financial Advisors**  
[www.meritfinancialadvisors.com](http://www.meritfinancialadvisors.com)  
[mbaer@meritfa.com](mailto:mbaer@meritfa.com)  
425-392-2200

# Bookkeeper

Your bookkeeper is your financial ally! With meticulous precision and a keen eye for detail, your bookkeeper ensures your business stays on track.

From managing cash flow to tracking expenses your bookkeeper is your financial partner, helping you make informed choices. They provide accurate insights into your company's financial health.

So, whether you're a small business or a large corporation, your bookkeeper will keep your finances in order.

## Who do we recommend?



**Gina Bianchi**

***Synergist Accounting***

[www.synergistaccounting.com](http://www.synergistaccounting.com)

[gina@synergistaccounting.com](mailto:gina@synergistaccounting.com)

206-395-8337

# Want to learn more?



We're here to help you free up time and money so you can focus on the heart of your business with **full-service bookkeeping**, advisory, and process automation!

LINK IN BIO

[www.synergistaccounting.com](http://www.synergistaccounting.com)