

Revenue Per SBA Express Enrollment

1. Client Enrollment	\$999
2. Key Person Policy Commission	\$ 500.00
3. Performance Fee	1.00%

SBA Express Workshop Assumptions

1. Number conducted	1
2. Average attendance	10
3. Average % buying KPP policy	90.00%

Financial Literacy One Hour Workshop Assumptions

1. Number conducted	1
2. Average Attendance	20
3. Needs Analysis conducted	50%
4. Average % buying KPP policy	50%

SBA Express Enrollments

1. Number enrolled (not via Express Workshop)	4
2. Average % buying KPP policy	75%

Access To Capital Workshop Assumptions

1. Number conducted	1
2. Average attendance	20
3. Average % buying KPP policy	90%

4 Week Access To Capital Program Enrollments

1. Number enrolled	20
2. Average % buying KPP policy	50%

Financial Assumptions

Average Capital Raise from SBA Express participants	\$ 100,000.00
Average Key Person Policy Commission	\$ 500.00

Monthly Branch Income Projections

Teaching Income	\$15,000.00
Performance Fee & Enrollment Income	\$14,000.00
Key Person Policy Commissions	\$37,000.00
Projected Monthly Gross Income	\$66,000.00

Monthly Branch Expense Projections

Branch License Fee	\$ 1,000.00
Branch Manager Salary	\$ 20,000.00
Branch Office Rent	\$ 2,000.00
Administrative Assistant Salary	\$ 4,000.00
Business Development Rep. Salary	\$ 6,000.00
Company Car	\$ 1,500.00
Employee Benefits & Retirement	\$ 5,000.00
Travel & Entertainment	\$ 3,000.00
Other, i.e. Error & Omissions, etc.	\$ 100.00

Projected Monthly Net Income \$23,400.00

Typical Revenue Streams For Branch Office Managers

1. Teaching Financial Literacy One Hour Workshops*: <https://www.smartmoneyalliance.org/business-financial-literacy/>
2. Teaching** One Day SBA Express Workshop* (same as #4 but teaching a group and completing in one day)
3. Teaching** One Day Access To Capital Workshop*: <https://www.smartmoneyalliance.org/access-to-capital-workshops/>
4. Enrolling clients in the SBA Express Program: <https://www.smartmoneyalliance.org/sba-express-program/>
5. Enrolling clients in the Four Week Access To Capital Program: <https://www.smartmoneyalliance.org/four-week-access-to-capital-program/>
6. Setting clients up a Key Person Policy

* Hosts provide the space and the marketing so not the burden nor cost of Branch Manager.

**We will send out a Field Trainer for your first event (at no cost to you) to get you properly trained.

Leadership Income

We are looking for Regional Directors who help develop and support Branch Offices. Earn overrides on the KPP production of all Branches.

What Is Excluded From This Model

1. Other asset protection and wealth creation income derived from Smart Money clients.
2. Override income by being a Regional Director which includes \$5,000 per branch PLUS overrides

NOTE: Highlighted yellow fields may be edited for what-if scenarios