



CRB is a special company that accepts the responsibility for its role in the global system of commerce. We believe that the purpose of business is to serve customers; develop people; improve communities; and grow shareholders' value.

### Corporate Focus

CRB wants to serve business clients and their stakeholders for the life of the business. Customer profile is a private company that needs additional financial management services that require multiple skill sets but cannot justify a full time employee in those roles. They also need coordination of their shareholder tax and wealth management strategies.

### Our Vision

To deliver financial management services for private companies that empower them to improve profits, minimize taxes and create true wealth for their stakeholders.

### Revenue Goals

- 2008 Revenue: **\$1.4 Million**
- 2009 Revenue: **\$1.6 Million**
- 2010 Revenue: **\$2.0 Million**

### Mission

***Our mission is to give our customers fanatical service with the right people, at the right time, at the right price that blends skills from the best of CPA's, MBA's and CFO's.***

### Competitive Advantages

- We focus on planned outcomes with cost effective planning tools that lower the barrier to use
- We can deliver consulting services as well as traditional accounting and tax services
- We focus on training our clients to be as self sufficient as they desire
- We work on a fixed fee basis that requires us to plan and execute to a target rather than hourly services

### 2008 Major Strategies

- Develop the "CRB Method" – making our processes more ingrained in how we handle client and administrative tasks
- Focus on continuous learning to ensure we are all allocating time to "sharpening the saw".
- Continue investing in the development of our people to help them achieve their maximum potential in life.
- Develop the next generation of reviewers for tax returns, financial statement and forecast modeling.
- Continue to attract clients that meet our target profiles and refer non-compliant clients to other preparers

### Organizational Theme

## **Observe, Analyze, Decide, Act**

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| <b>Observe</b> | Don't be fooled by routine or falling into "processing" mode. Observation is the first step of discovering true opportunity. |
| <b>Analyze</b> | Use your own experience and those of your peers to identify possibilities.   |
| <b>Decide</b>  | Choose a course of action and commit to it. Avoid paralysis by analysis.   |
| <b>Act</b>     | Vision without execution is hallucination.   |

### Core Values

As members of the CRB team, the following are the CORE VALUES that drive our individual behaviors and contributions to building a great company...the ABC's of CRB:

- **A**lways serve the customer by exceeding their expectations and appreciating their business
- **B**e purposeful in everything you do and how you make a difference every day
- **C**ontinuously improve everything with a commitment to measurement, performance, and accountability

### Expectations of our Team Members

CRB is a special company because we have special people on our team. The following are the minimal expectations of everyone:

- Think! Don't process
- Be passionate about your role and how you make a difference
- Thirst for learning to reach your full potential
- Take responsibility and ownership for your decisions
- Be candid with everyone
- Face reality as it is, not as it was or how you wish it were

### Expectations of our Leaders

In order for CRB to achieve the challenging goals and objectives we have established, we require the best executive leadership in all positions. The following are the minimal expectations of a leader:

- Develop people, lead with attitude and train for skills
- Demand excellence from yourself and those you lead
- Learn to love training
- Provide resources
- Develop plans and deliver results