

## CLIENT PROSPECTUS

### WHO WE ARE

Since 2011, we've developed plans for entrepreneurs, small-to-medium sized business owners, and individuals who want to maximize their investments and profitability. Brio offers market strategies, business development expertise, and financial planning services; our clients can trust us to be accountable—and real—in everything we do.



**Lena Banks, CFP** is the owner of Brio Consulting. Her passion for business development and financial analysis is the foundation of her nearly 20 years' experience across various industries. Her focus is helping decision-makers confidently set and meet goals that drive organizational growth, and she enjoys tailoring and implementing plans that produce measurable change.

### WHAT WE DO

**We understand** that no single approach is the right one for every individual, company, or campaign.

So in short, we help you **identify the unavoidable trends, and potential opportunities** you face as a business, investor, and/or entrepreneur. Then we make a plan, **and work together to put it into action.**

#### Services:

- Marketing Planning and Implementation
- Business Development/New Market Strategies
- Financial Planning
- Investment Management

### HOW WE WORK

- **Engage:** getting to know you, and your goals.
- **Gather:** collecting data and doing our research.
- **Analyze:** identifying and understanding your unique challenges.
- **Develop:** producing market and development strategies that are customized for you.
- **Communicate:** telling you—in easy-to-understand language—how the plan will work.
- **Implement:** supporting you in executing our shared vision.
- **Monitor and Measure:** keeping an eye on progress, and adjusting as needed.

