

# The Business Owner's Blueprint

## Business Strategies for Success

September 2026-Issue 1

Presented by: Jenny McAdow-FSCP

### Helping Small & Mid-Sized Business Owners

Build Strong Foundations • Protect Their Business • Grow Their Wealth • Preserve Their Legacy



Welcome to the inaugural edition of The Business Owner's Blueprint.

My name is Jenny McAdow, financial advisor\* & founder of JMAC Financial Strategies, LLC. My mission is simple: to help business owners protect what they've built, grow their wealth, prepare for the unexpected, and confidently plan for the future.

As a business owner, you're focused on running your company, serving your customers, and planning for growth. It's easy for long-term planning to take a back seat. My goal is to help you stay ahead by sharing practical strategies that strengthen your business, protect what you've built, and prepare you for the future. Each month, we'll cover topics that matter most to small and mid-sized business owners, including:

- Business planning and growth strategies
- Key person insurance and business continuity
- Succession and exit planning
- Retirement and investment strategies
- Employee benefits and retention
- Tax-Efficient Financial Strategies
- Estate and legacy planning
- Year-end planning opportunities

This newsletter is about providing valuable insights and practical ideas you can use to make informed decisions for your business, your employees, and your family. Thank you for joining me on this journey. I look forward to sharing strategies that help you build a stronger business and a lasting legacy.

Here's to your continued success!

\*Financial Advisor offering investment advisory services through Eagle Strategies LLC, a Registered Investment Adviser. Registered Representative offering securities through NYLIFE Securities LLC (member FINRA/SIPC), A Licensed Insurance Agency. Eagle Strategies and NYLIFE Securities are New York Life Companies. JMAC Financial Strategies, LLC is independently owned and operated from NYLIFE Securities, LLC and its affiliates.

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### Business Owner's Mid-Year Success Checklist

#### Is Your Business Prepared for What's Next?

Take a few minutes to review this checklist and identify opportunities to strengthen your business and prepare for the future.



#### Protection & Risk Management

- ☐ Do I have enough life insurance to protect my family and business?
- ☐ Is my Key Person Insurance still appropriate for my business?
- ☐ Have I reviewed my business continuity plan within the last year?
- ☐ Have I updated my Buy-Sell Agreement (if applicable)?



#### Growth & Financial Planning

- ☐ Do I have a written business growth plan for the next 12 months?
- ☐ Have I reviewed my retirement savings strategy?
- ☐ Am I investing excess business cash efficiently?
- ☐ Have I met with my CPA or financial advisor this year?



#### Employees & Benefits

- ☐ Are my employee benefits helping me attract and retain quality employees?
- ☐ Have I reviewed executive benefit opportunities for key employees?
- ☐ Are my compensation and retention strategies still competitive?



#### Succession & Legacy

- ☐ If something happened to me tomorrow, could my business continue operating?
- ☐ Do I have a written succession or exit plan?
- ☐ Have I updated my estate planning documents within the last five years?
- ☐ Do my family and key advisors know my wishes?



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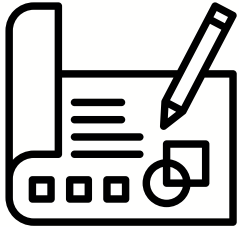
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### Blueprint Action Step

Schedule **30 minutes** in the next **30 days**

- review **one** area of your business that you've been putting off.
  - succession plan
  - employee benefits
  - retirement strategy
  - protection needs

Small, intentional steps today can help prevent costly surprises tomorrow.



### A Little Funny Business...

Business Owner: "I have a succession plan."

Advisor: "Great! Who takes over if something happens to you?"

Business Owner: "Apparently, whoever knows all my passwords."



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