

## CASE STUDY

First-time business owner of thriving start-up.



Comprehensive Planning

Investment Management

### AT A GLANCE

- Business Planning
- Cash Flow & Budgeting
- Tax Management
- Investment Planning

### CLIENT OVERVIEW - "HOW IT STARTED"

Jasmine started a business with her childhood friend during the COVID pandemic. They created an at-home art experience inspired by female street artists. They did not anticipate this much sustained success. Jasmine is taking no income yet from the company yet, so managing her cash flow has become challenging.

Jasmine has limited financial education and is overwhelmed with all of the moving pieces in her current situation. She was referred to Zenith through another entrepreneur that works with them. She needs help with both her personal finances and business planning.



Flexibility



Trust



Simplicity



Inclusivity

### THE SOLUTION - "HOW IT'S GOING"

Jasmine engaged with Zenith shortly after her initial conversation. Since they started, she was able to reduce taxes across her business and personal returns. She feels more confident about the management of finances for both her business and personal goals.

She has appreciated Zenith's time in learning about her personal goals; they helped address her fears of never retiring by opening a SEP IRA. They also took the time to educate her throughout the process as well as encourage continuous feedback. She feels more confident and has more time to focus on her thriving business.