



A New Logo and a Nifty Theory

It's important that we explain a little theory to you, our valued clients and friends. You see, we have a purpose and vision behind our firm. We don't simply operate on a whim. And we want you to know more about our firm's theory of operation, and how they apply to you.

First, let us explain our logo. Notice we started with a black box, as most accountants work inside of a box.

As a general rule, we ignore the box.

We are not defined by any preconceived notion that you may have about accountants or CPAs. Our visions blow away all boxes. Notice the colors, which represent our four core services. They are sitting nicely outside of the box. Again, this is how we operate – outside of the box.

As mentioned, the four colors represent our four core services: (1) Accounting, (2) Tax, (3) Business Consulting and (4) Fraud/Forensic Litigation Support and Consulting. Note that the colors seem to be moving forward. We are truly moving forward and are a progressive firm in the use of technology, service to our clients, the invaluable business consulting we provide, our manner of teaching, our vision for new ways and methods of helping you run your business, and the fact that we can explain things to you in a language you can understand. We want to always be moving forward. And our new tag line sums up our focus on you, as our client, and your business:

Business Focused People • People Focused Business

Now to the theory behind our purpose. As we look ahead 5 to 10 years, we are noticing a potential large shift in businesses. Most notably, the baby boomers will be passing on their businesses to the younger Generation X. This process has already begun, and offers new and exciting opportunities for the business owner and the individual. Our firm is headed toward serving this population in a major way.

This generational shift is seeing a new type of business owner rise to the surface – one interested in running their business, knowing all about their business and taking on the responsibility for its direction. It is a generation of tech-savvy individuals (for the most part) who want a considerable hand in managing their day-to-day operations as well as their tax and financial transactions. They want to develop strategies to operate more efficiently and more effectively. And we are glad to oblige.

Our theory, dubbed the **THRIVEal** (pronounced “thriy-vuhl”) theory, puts the responsibility on this new generational owner to manage their business, their people and their future. We think they want it this way. And we think they want consultants who can help them get what they want. We want to be those consultants and CPAs. We want to assist them in developing structures for their business to operate effectively. We want to teach them to run the financial aspects of their business. We want them to have the “official” set of books for their company (not us). We want them to look at their business indicators, make decisions from them and make changes for their future.

We want this for them because we think they want this too. They are the experts at what they do, not us. We are simply the catalysts for them to get what they want – a well-run business that is profitable and visionary. Our theory is so new we had to create a new word to describe it – **THRIVEal**. So many businesses are in survival mode. Our theory of **THRIVEal** smacks in the face of survival. We want our clients to thrive!

Implementing THRIVEal Theory

THRIVEal Theory describes these four owners/individuals:

- 1 Business owners and individuals with an eye to the future of business, noting trends and acting on those trends today
- 2 Business owners and individuals who take on the responsibility of financial management, proper operations and right strategies to succeed
- 3 Business owners and individuals who embrace excellent training and learning to succeed and accomplish their business and individual goals
- 4 Business owners and individuals who are poised to accept change in a global marketplace and benefit from its lessons and blessings

At the core of these four main points is entrepreneurial thought. Entrepreneurs (visionaries) think this way. And Generation X is a generation of entrepreneurs, much like the Boomers who preceded them (and continue to run our country's economy !). And according to current research, many Boomers will continue the trend of leading the way in new business and entrepreneurial endeavors after retirement. These visionaries are not content with where they are and the impact they are making in the world. They are visionary, and want to do more. We like that kind of thinking. We want to be there to consult, teach, educate and lead in these endeavors. We want to get into the details of these new thoughts, businesses and visions.

To do this, **we have developed classes** that are taught at our offices off of Wade Hampton Boulevard in Greenville, SC. They are classes designed to teach various business lessons, new tax understandings, entrepreneurial thought, basic business terminology, QuickBooks classes, etc. As we continue to offer these new classes, we want to hear your input as to what you want to learn. The environment will be fun, technologically advanced, challenging, visionary and extremely useful. They will be offered twice per year in May and November, and we anticipate they will each be four (4) hours in length. Of course, they will be of no cost to our clients, and only minimal costs to nonclients. Here are some of our class titles:

- “Running Your Business on QuickBooks: An Introduction”
- “Advanced QuickBooks Topics: Managing the Business”
- “Basic Tax Topics for the Business Owner”
- “Developing Key Management Indicators for Your Business”
- “The Future of Business: What to do Now”
- “Choice of Taxable Entity for the New Entrepreneur”
- “Hot Topics for the Small Business”
- “Efficient Use of Business Technology”
- “Future-Oriented Strategies: How to Budget for your Business”
- “Making Sense of Marketing, Branding and Networking Your Business”
- “Becoming a Women Entrepreneur”
- “Second Life: Entrepreneurial Opportunities After Retirement”

We are excited about these new opportunities, and what they can mean for our business and individual clients. We truly look forward to the discussions and learning (and networking!) that will take place. In another effort to brain wash our clients in this **THRIVEal** theory, Jason M. Blumer, the President and Managing Shareholder of the firm, maintains a business blog with tons of new and enlightening information. For those new to blogs, it is simply a new type of website that is updated regularly and consistently with business information of interest to our clients. It is an interactive type of site where you can leave comments and Jason can respond quickly. Think of it as a new way for our firm to deliver relevant newsletters on topics of interest to the business community. You can find this new blog at:

<http://www.thriveal.com>

We are excited about all that the future has to offer! We look forward to a prosperous year with many of God's great blessings! We hope you come along with us... into the future of business!