Breakaway Financial Group

How We Take the Weight Off Your Shoulders

One partner, running your business and personal finances as a single system.

THE MODEL

The Entrepreneurial Wealth Agent

Most owners are handed advice and left to run everything themselves. We do the opposite. As your Entrepreneurial Wealth Agent, we get inside the business, do the work, and coordinate your entire financial life, business and personal, as one connected system. The picture is always complete, and roughly 80% of the financial burden comes off your plate.

- Bookkeeping & Reconciliation
- Business & Personal Cash Flow
- Proactive Tax Strategy
- Business Strategy & Growth
- In-the-Room Representation
- Payroll Oversight
- Investment Management
- Financial Reporting & Dashboards
- Wealth & Estate Planning
- One Coordinated Team

YOUR FINANCIAL MANAGEMENT

Cash Flow Planning

CLARITY AND CONTROL OVER EVERY DOLLAR, IN THE BUSINESS AND AT HOME.

- The BAFG Cash Flow System with dedicated accounts and runway targets
- A personal cash flow structure that builds wealth automatically
- Profit and owner-pay planning
- Reserve and runway sizing
- Debt and financing review
- Cash management that puts idle money to work

Tax Planning

KEEPING MORE OF WHAT YOUR BUSINESS EARNS, AND WHAT YOU EARN.

- Ongoing compliance and filings done right
- Entity structure and S Corp strategy
- Proactive multi-year tax planning
- Advanced strategies, from accountable plans to the Augusta Rule
- Owner compensation planning
- Quarterly estimates managed for you

Wealth Management

YOUR PERSONAL WEALTH, BUILT AND PROTECTED ON PURPOSE.

- Investment management built around your plan, not the mass market
- Retirement and contribution planning
- Wealth Gap planning, so you know how much is enough
- Estate and legacy coordination
- Insurance and protection review
- Education planning

YOUR BUSINESS ADVISORY

Strategic Planning

A CLEAR DIRECTION FOR THE BUSINESS, NOT GROWTH BY ACCIDENT.

- Vision and goal setting
- 90-day execution sprints
- Growth and scaling strategy
- KPIs and accountability
- Team and operations planning

Financial Planning & Forecasting

KNOWING YOUR NUMBERS BEFORE YOU GET THERE, NOT AFTER.

- Budgeting and forecasting
- Financial dashboards and reporting
- Break-even and margin analysis
- Scenario and what-if modeling
- Financing and capital planning

Value Acceleration Planning

BUILDING A BUSINESS THAT CAN SELL FOR MORE.

- Business valuation and value drivers
- A value acceleration roadmap
- Reducing the business's dependence on you
- Systemizing and documenting operations
- Exit and transition readiness

The Value of One Partner Who Carries It All

What you get when your whole financial life finally works together.

Breakaway Financial Group

An integrated partnership delivers value in a few ways. It puts more money in your pocket, it lowers the risks that could set you back, it gives you back time and focus for the work only you can do, and it helps you make better decisions year after year. Some of that value is measurable. Much of it is not, and the biggest win is often the weight lifted.

80%

OF THE BURDEN, LIFTED

Roughly 80% of the financial work, off your plate.

We take the bookkeeping, the payroll, the tax strategy, and the planning off your shoulders, so your time, your attention, and your energy go back where they belong: growing the business. That is where the real return lives.

TYPES OF VALUE: Money Kept · Time & Focus · Risk Reduced · Better Decisions

Cash Flow Planning

MONEY KEPT · BETTER DECISIONS

Most owners undersave because their cash flow is invisible, not because they earn too little. A system that names where every dollar goes turns guesswork into intentional wealth, in the business and at home.

Tax Planning

MONEY KEPT

Every dollar you overpay in tax is a dollar that never compounds. Proactive, year-round strategy, not a once-a-year filing, is where the real savings live for a business owner.

Wealth Management

MONEY KEPT · RISK REDUCED

A portfolio built around your plan and your business, plus protection so one event cannot undo years of building. And the Wealth Gap made clear: how much is enough, and when.

Strategic Planning

BETTER DECISIONS

Direction the business can be run against. Goals, sprints, and accountability, so growth is something you plan for instead of something that surprises you.

Financial Planning & Forecasting

BETTER DECISIONS · RISK REDUCED

Numbers you can see coming. Budgets, forecasts, and dashboards that turn the business from a black box into something you steer with confidence.

Value Acceleration Planning

MONEY KEPT · BETTER DECISIONS

Your business is likely your largest asset. Building its value and reducing its dependence on you is the difference between a job you own and a company you can sell.

The Entrepreneurial Wealth Agent Difference

TIME & FOCUS

One partner in the room, doing the work, so you stop coordinating five professionals who never talk to each other. The mental space to focus on what only you can do is rarely a percentage, but it is often the biggest win of all.

In the Room, and Coordinated

TIME & FOCUS · BETTER DECISIONS

We keep the calendar, coordinate with your CPA and attorney, and show up when you meet your banker or your lawyer. Plans do not fail on paper, they fail in the follow-through, and we own the follow-through.