

Ann Marie Puig Provides Tips on Creating Financial Strategies in a Small Business

Costa Rican business leader and philanthropist Ann Marie Puig discusses creating financial strategies in a small business in order to achieve wealth goals.

SAN JOSE, COSTA RICA, June 27, 2019 /EINPresswire.com/ -- For any small business to be

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successful, a clear financial strategy has to be developed. It fills in as a guide for the future, delineating the useful advances you have to take so as to accomplish your budgetary objectives. It also gives you the true serenity that you're destined for success. [Ann Marie Puig](#), a successful businesswoman and philanthropist from Costa Rica, offers five basic tips to get the development process started.

Begin by setting specific and clean financial goals. Each entrepreneur has financial desires; it's the explicitness of these objectives that separates the truly successful from

those who don't reach the level they expected. There's a major distinction between "attempting to get as much money as you can" and "embarking to make a particular number by a particular date." Asserts Puig, "Without explicit objectives to point toward, you may feel overpowered and lacking of focus on the goals. Go for nothing and hit it with mind-blowing exactness."

In the event that this sounds recognizable, schedule a day to conceptualize precisely what it is that you need to accomplish. Are you looking to consolidate or reduce debt? Or do you want to expand and acquire new entities? The first step is to identify the ideal result and then establish a figure that will help you attain that goal.

Your bookkeeper ought to be included starting from the earliest stage. They have the skills and experience required to take your financial plan to the next level. You must bring long-term financial goals to the table – figuring out how to reach those goals and make your dreams reality is the accountant's job at that point. All through the procedure, your accountant ought to be close by to screen advancement and offer help as required.

It's now time to do the math. Create profit and losses and balance sheet projections, which will give you a realistic picture of where the business currently is, in which direction it is headed and what is needed to ensure you reach the financial goals.

Adds Puig, "You may need to think about how you need to support your financial system and see making additional investments in order to create the wealth opportunities needed to meet your objectives. In this case, it also might be beneficial to talk to a financial advisor, as well."

When you have set up your budgetary objectives, counseled with your accountant and arranged the fundamental projections, you can gradually start to actualize your system. During the beginning times, it's a smart idea to plan regularly scheduled meetings – in person or over the phone - to guarantee that you're in good shape.

Setting up a budgetary system is definitely not a task that can be established and forgotten.

Most methodologies require many adjustments over time to guarantee they stay applicable. At most, strategies should be review every quarter; however, it wouldn't be a bad idea to review them every month, especially at first, to ensure everything is on track. When in doubt, you ought to likewise plan for an official audit on the off chance that you change your objectives, or if your business experiences any real changes (for instance, you get another accomplice or get another venture).

About Ann Marie Puig

Ann Marie Puig has been a distinguished Consultant, Assistant Controller, Accounting Manager, Director of Accounting and Finance and Chief Financial Officer for almost 20 years. She is bilingual in Spanish and English and has a reputation for accurate, clear and concise record management in month-end closings, accruals, reconciliations, AP, AR and JE, as well as superior human resource skills. She is extremely knowledgeable in current technology, eCommerce and a variety of Industries.

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