

# Cohort Groups

Cohort #	1	2	3	4	5	6	7
Facilitator	<i>José Balcazar</i>	<i>Caroline Cummings</i>	<i>Corey Wright</i>	<i>Stephanie LeQuieu</i>	<i>Ariel Ruben</i>	<i>Mike Johnston</i>	<i>Laura Furgurson</i>
Mentor	<i>Ani Raas</i>	<i>Ron Green</i>	<i>Toraj Khavari</i>	<i>Rod Ray</i>	<i>Seth Clark</i>	<i>Michael Couch</i>	<i>Wendy Ludwig</i>

# Virtual Etiquette

- Please remain **MUTED** throughout the main sessions. We DO want you to interact though, so if you have questions, post them in the **CHAT** feature or use the “**Raise Hand**” feature, we will call on you to unmute.
- This program is about learning and growing better at finances together. **Please do not market your services to classmates.**
- **Be on time!** Breakout rooms are at the beginning of most workshops, so do your best to show up.
- **This is a place for learning and inclusivity.** We are here to support you and we want you to **be supportive of each other.** **Be sure to give others a chance to speak!**
- All things share in breakouts are **CONFIDENTIAL** and should not be shared.

# MONEYmaker

a financial accelerator program

Hosted by **RAIN**  
OREGON



**March 31 to June 30**  
**9:00 - 10:30 AM on Wednesdays**

## Week 7

### Budgets & Forecasts: Introduction & Application

# 13 Weeks of Financial Fun!



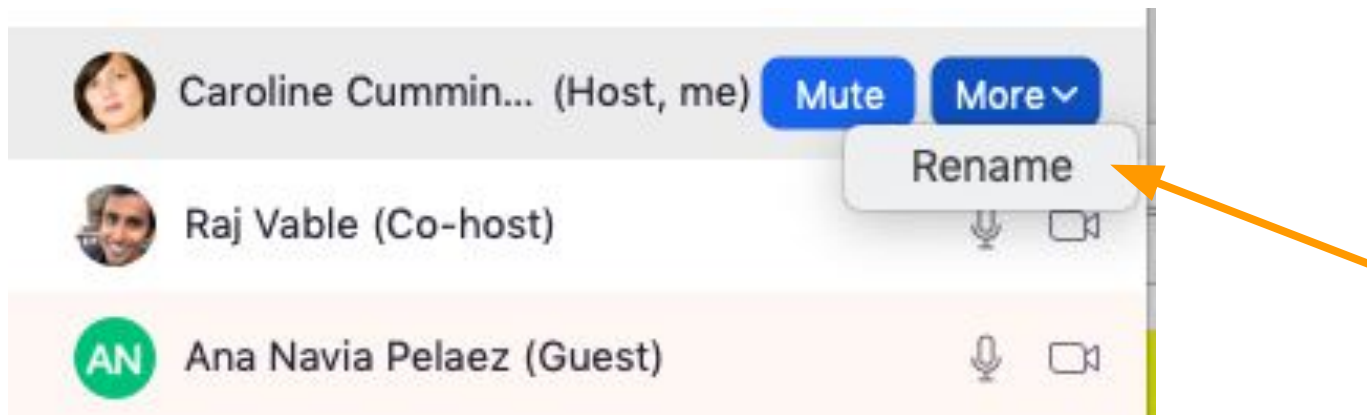
**Week 5:** Managing Balance Sheets

**Week 6:** Pricing & Margins

**Week 7:** Budgets & Forecasts: Introduction & Application

**Week 8:** Budgets & Forecasts: Strategic Forecasting & Management

# Click “Participants” to Rename Yourself



## Cohort Number + First and Last Name

*(This is necessary to facilitate transferring you to current break-out sessions. Thanks!)*

**Example: 3 - Corey Wright**

**All main sessions will be recorded**  
(but not break-out rooms)







# *Thank You!*



**Julia Carlson**

*CEO / Founder*

Financial Freedom  
Wealth Mgmt Group



Financial*freedom*.<sup>TM</sup>

WEALTH MANAGEMENT GROUP, LLC



# Margin Formula?

(Revenue - Cost)

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Revenue



# Survey Time!

## Help us help you!

<https://forms.gle/fLGH8NFw2gFExpkn8>

**(by the end of next week, the 18th)**

# Budgets & Forecasts: Introduction & Application



**Peter Thorsson**

*Business Development and Strategic  
Partnerships, SMB Mentor*



**Palo Alto Software**

 **LivePlan**

MONEYmaker

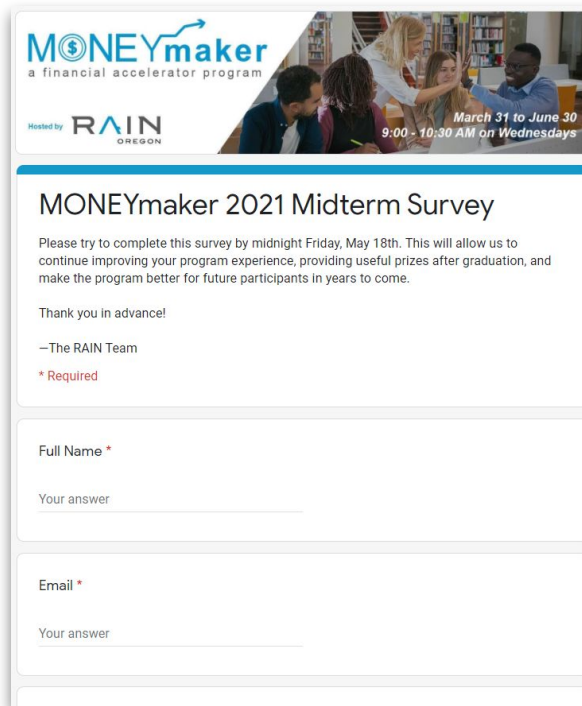
*Logistics + Q&A*

# This Week's Homework

Please take our  
**MONEYmaker Midterm  
Survey!**

(:

[https://forms.gle/kgtPBt5  
MChzvZHr87](https://forms.gle/kgtPBt5MChzvZHr87)



The screenshot shows the top portion of a survey form. At the top, there is a header banner with the MONEYmaker logo (a blue circle with a white 'M' and a blue arrow pointing up and to the right) and the text 'a financial accelerator program'. Below this, it says 'Hosted by RAIN OREGON'. To the right of the text is a photograph of four diverse young adults in a library or study setting, looking at books. Overlaid on the photo is the text 'March 31 to June 30' and '9:00 - 10:30 AM on Wednesdays'. Below the banner, the title 'MONEYmaker 2021 Midterm Survey' is displayed. The main text of the survey asks participants to complete the survey by midnight Friday, May 18th, to help improve the program. It includes a thank you message and a signature from 'The RAIN Team'. Below this, there are two input fields: 'Full Name \*' and 'Email \*', each with a 'Your answer' label and a text input line. The form is styled with a light blue and white color scheme.

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### MONEYmaker 2021 Midterm Survey

Please try to complete this survey by midnight Friday, May 18th. This will allow us to continue improving your program experience, providing useful prizes after graduation, and make the program better for future participants in years to come.

Thank you in advance!

—The RAIN Team

\* Required

Full Name \*

Your answer

Email \*

Your answer

# This Week's Homework

## Video & HW Instructions

*On the Week 7 Resource Page!*

The screenshot shows the RAIN MONEYmaker Class Resources Page. The header includes navigation links: Request RAIN, About, Español, News, Events & Programs, Open Positions, and Contact. The main heading is "MONEYmaker" with a dollar sign icon, followed by "Class Resources Page". Below this, a paragraph states: "Please use this page to find all relevant information for each week of classes in the MONEYmaker Accelerator program." Another paragraph lists included resources: "This includes: Zoom links, schedules, slides, speaker mentor hours, cohort info, resources, handouts, and more!" A note mentions that information will be updated as it becomes available, at least 24 hours after a class is finished. A blue button says "HUGE THANKS TO OUR SPONSORS!". A "Quick Links" section contains five links: "Link to MONEYmaker Zoom Meeting", "Link to MONEYmaker Slack channel", "Link to MONEYmaker Class Info", "Link to MONEYmaker Cohorts", and "Link to MONEYmaker Speakers". The bottom section is titled "Upcoming Mentor Hours with Guest Speakers" and lists three sessions: "Horas semanales de tutoría con José A. Balcázar" (Semanalmente, los jueves de 10:00 a 11:00 horas), "Mentor Hour with Peter Thorsson", and "Mentor Hour with Peter Thorsson".

## LivePlan Sign-Up Links

*On the Week 7 Resource Page!*

The screenshot shows a Google Sheet titled "RAIN LivePlan codes". The spreadsheet is divided into two main sections. The first section, labeled "STEP 1: Type your name in an empty column below.", contains a table with columns A, B, C, D, and E. Column A is for the name, and column B is for the sign-up link. The second section, labeled "STEP 2: Click the link to the RIGHT of your name to sign up for 3 months of LivePlan free.", contains a table with columns A, B, C, D, and E. Column A is for the name, and column B is for the sign-up link. The spreadsheet also includes a "ONE LINK PER PERSON" instruction and a "Sign up URL (DO NOT DELETE!! ONLY USE ONE LINK!!)" instruction. The spreadsheet is titled "Example: Corey Wright" and shows a list of names and their corresponding LivePlan sign-up links.

Video, Links, & Resources will be live after 2pm.

**This Friday:**

**MONEYmaker Mentor  
Hour with Peter Thorsson**

*Friday @ 9:00 am via Zoom,  
info & link on Resources Page*



**Peter Thorsson**

*Business Development and  
Strategic Partnerships, SMB  
Mentor*

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## Week 8

### ***Budgets & Forecasts: Strategic Forecasting & Management***

*Peter Thorsson, Palo Alto Software*

**Log in at 9:00  
sharp to head  
straight to your  
cohort group for  
debrief and  
networking!**





## Questions + Networking

*Feel free to leave now if you need to go. We'll stick around for a few more minutes if folks have any follow up questions!*