

# 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 8

### Budgets & Forecasts: Strategic Forecasting & Management

# 13 Weeks of Financial Fun!



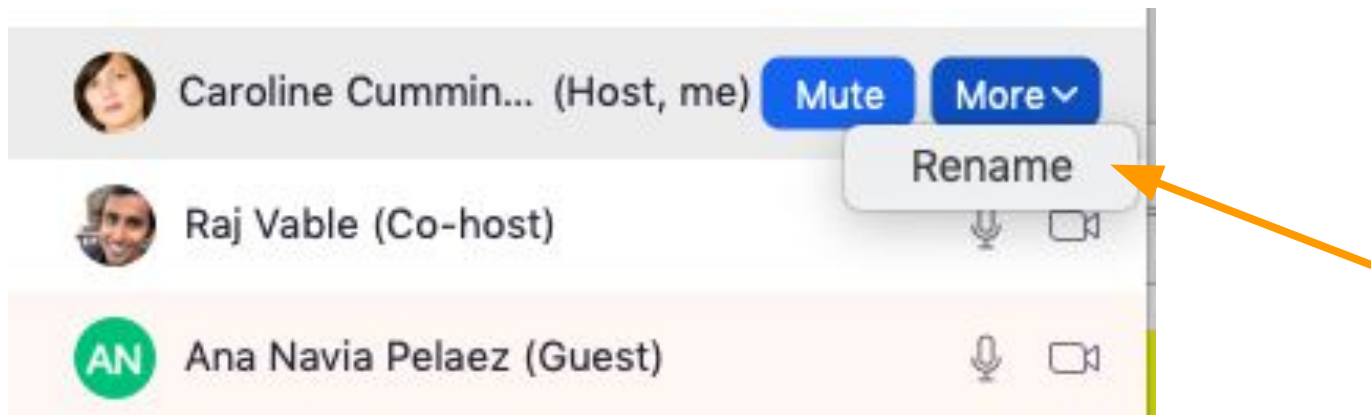
**Week 5:** Managing Balance Sheets

**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)





# Survey Time!

## Help us help you!



<https://forms.gle/fLGH8NFw2gFExpkn8>

**!Last Chance!**

# Graduation + Attendance

- To graduate, you must attend **11/13 sessions**, including graduation!
- ◆ We will share your attendance specs for you to confirm
- ◆ Making up by watching the videos “counts”
- Graduation Ceremony: awesome prizes, a 2-slide presentation, and a keynote speaker! Book your calendar for **June 30th at 9am.**





# Difference between Financial Statements & Projections/Forecasts

Financial Statements must follow accounting guidelines, which are typically set by the government. While there is sometimes a little flexibility in terms of how you classify expenses, most things are clearly specified, for example, paying yourself cash out of the business would be an “owner’s equity draw” or “dividend payment”.

Forecasts & Budgets are tools that YOU create to help you plan and have a strong business model. There are best practices, but not necessarily legal rules to how you create a forecast. In general, it is helpful if they mirror financial statements, but that isn’t a hard and fast requirement.





# *Thank You!*



**Julia Carlson**

*CEO / Founder*

Financial Freedom  
Wealth Mgmt Group



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

WEALTH MANAGEMENT GROUP, LLC

# Budgets & Forecasts: Introduction & Application



**Peter Thorsson**

*Business Development and Strategic  
Partnerships, SMB Mentor*



**Palo Alto Software**

 **LivePlan**

MONEYmaker

*Logistics + Q&A*

# Homework...

## Video & HW Instructions

*On the Week 8 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 tagline "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. 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. A blue button says "HUGE THANKS TO OUR SPONSORS!". On the right, a "Quick Links" section contains five buttons: "Link to MONEYmaker Zoom Meeting", "Link to MONEYmaker Slack channel", "Link to MONEYmaker Class Info", "Link to MONEYmaker Cohorts", and "Link to MONEYmaker Speakers". At the bottom, there's a section for "Upcoming Mentor Hours with Guest Speakers" with three cards: "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 sheet has two main columns with instructions. Column A (rows 1-24) contains the instruction: "STEP 1: Type your name in an empty column below." and "ONE LINK PER PERSON: Please type your name to note that this code is taken! Example: Corey Wright". Column B (rows 1-24) contains the instruction: "STEP 2: Click the link to the RIGHT of your name to sign up for 3 months of LivePlan free." and "Sign up URL (DO NOT DELETE!!! ONLY USE ONE LINK!!!)". The sheet lists 24 unique LivePlan sign-up URLs in column B, each corresponding to a name in column A. The URLs are all "https://www.liveplan.com/promo?pm=3MONTHFREE-`" followed by a unique code. The sheet is titled "Example: Corey Wright" in the top right corner.`

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

**This Thursday:**

**MONEYmaker Mentor  
Hour with Peter Thorsson**

*Thursday @ 10:00 am via Zoom,  
info & link on Resources Page*



**Peter Thorsson**

*Business Development and Strategic  
Partnerships, SMB Mentor*

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## Week 9

### *Money Stories from Startup Founders*

*Corey Wright, Founder of Massif Games*

*Paula Hayes, Founder & President of Hue Noir*

**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!*