

# PROFIT FIRST AS A SERVICE

## THAT GENERATES REVENUE & ROI

# FOR BOOKKEEPERS







211,069  
7,117  
10,531  
38,602  

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267,319

30,000  
35,000  
170,000  
90,280  
232,053  
260,280  
267,319  
295,951  

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0.000  
0.000



# DECREASE THE FAILURE RATE OF BUSINESSES





# KATIE



MULTIPLE  
BUSINESS OWNER



AUTHOR

TRANSFORM YOUR BUSINESS FROM A CASH EATING  
MONSTER TO A MONEY MAKING MACHINE

## PROFIT FIRST FOR TRADIES



KATIE CRISMALE-MARSHALL  
FOREWORD BY MIKE MICHALOWICZ



PODCASTER



SPEAKER



FUN CENTRIC



FORMER  
FINANCIAL PLANNER



LOVER OF TRAVEL



CAR LOVER



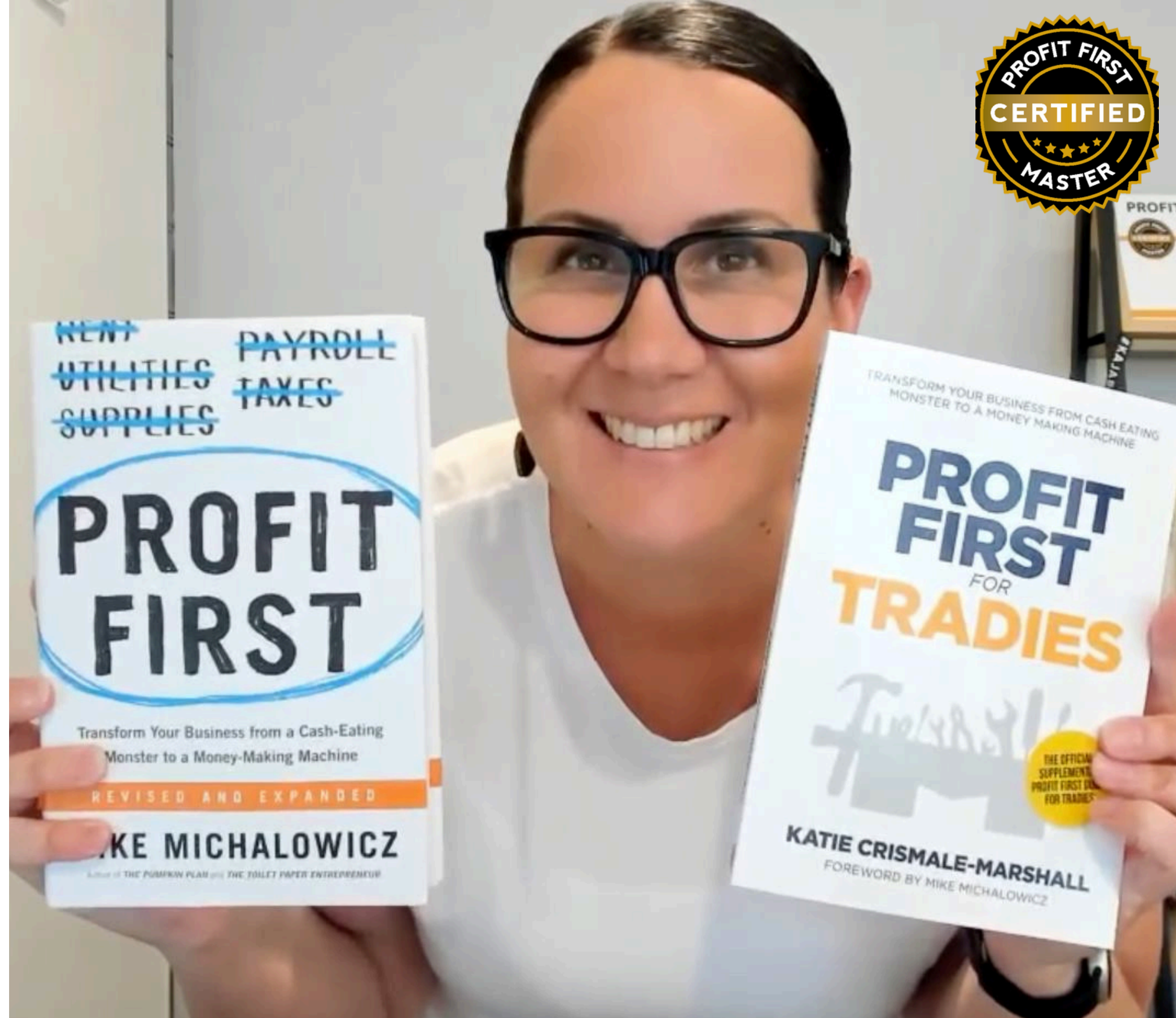


# MY JOURNEY

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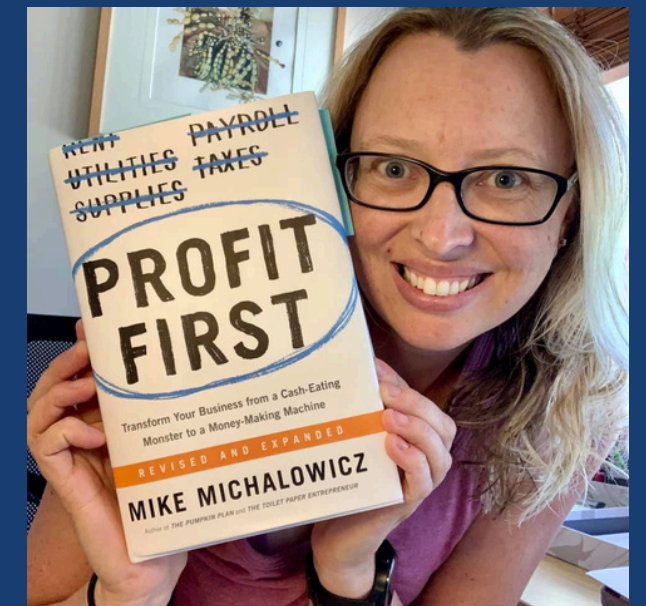
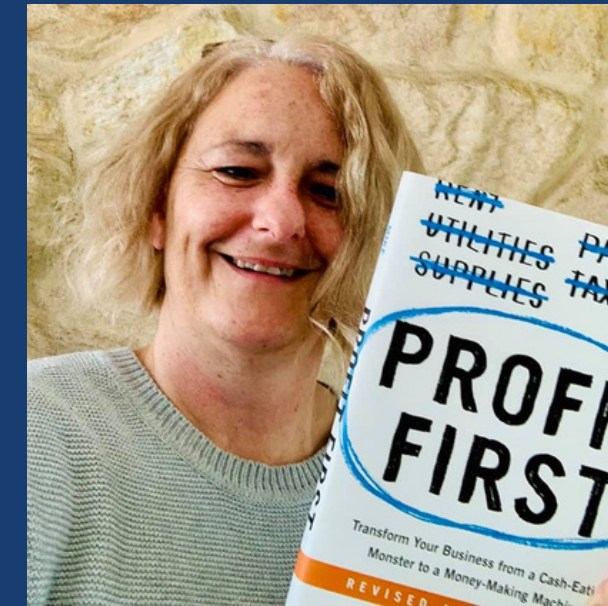
- Bookkeeper
- Mastery Level PFP

*"Profit First I always say it's, you know, it's a marathon, it's not a sprint, we want to start making these little changes now, so that they all accumulate and make it better for us not only now but more so down the track as well."*



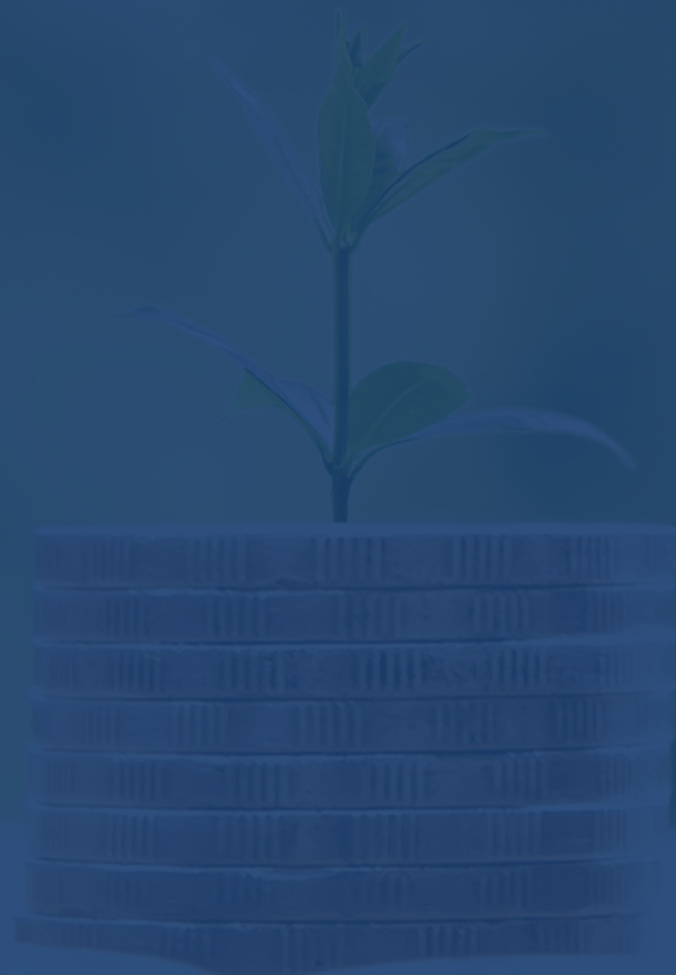


KATIE - CEO Profit First ANZ





**PROFIT FIRST**





# PROFIT FIRST FORMULA

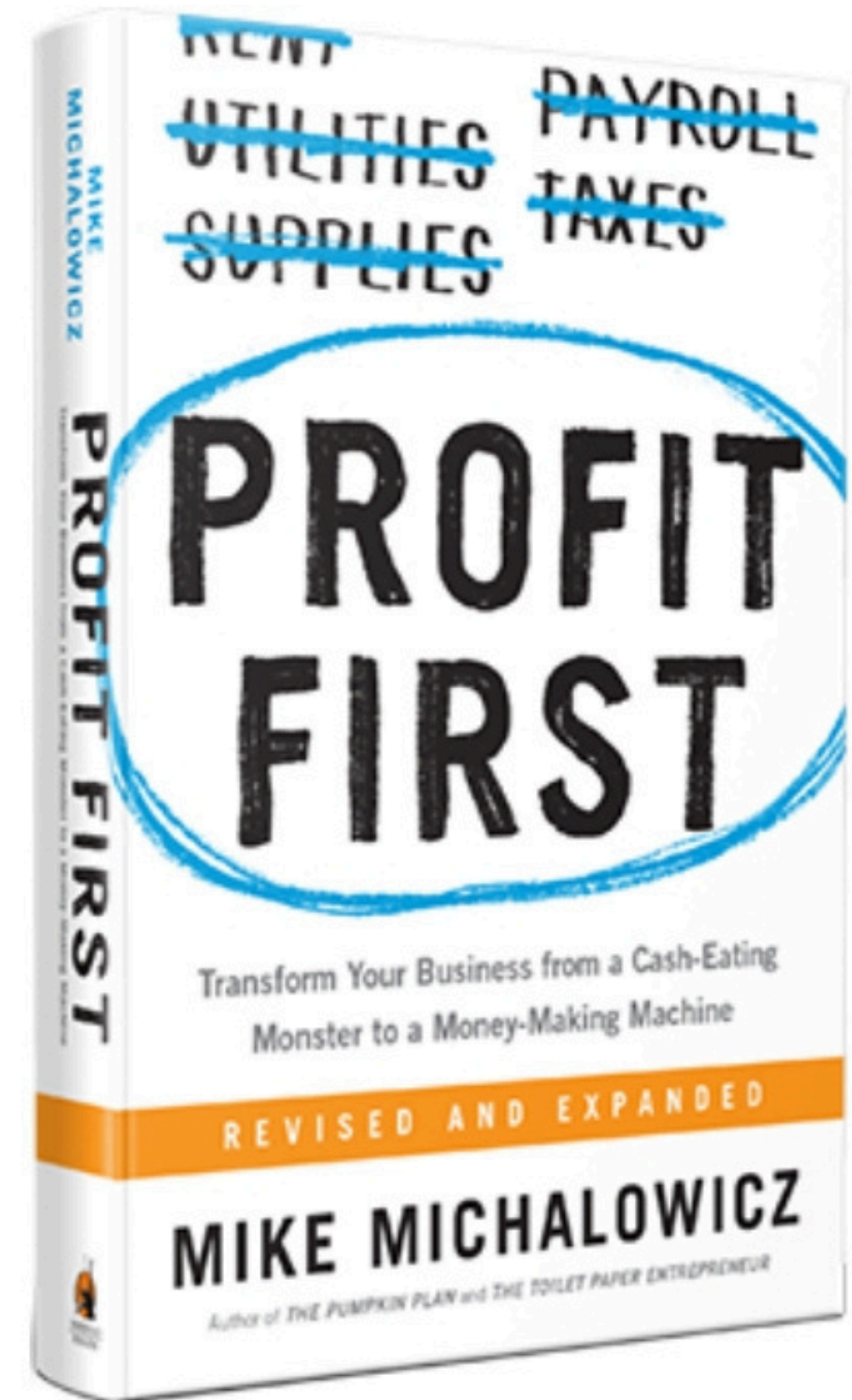
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$$\text{SALES} - \text{PROFIT} = \text{EXPENSES}$$

What you see or do first is what is the focus

Profit = Purpose

Creative thinking & wealth creation





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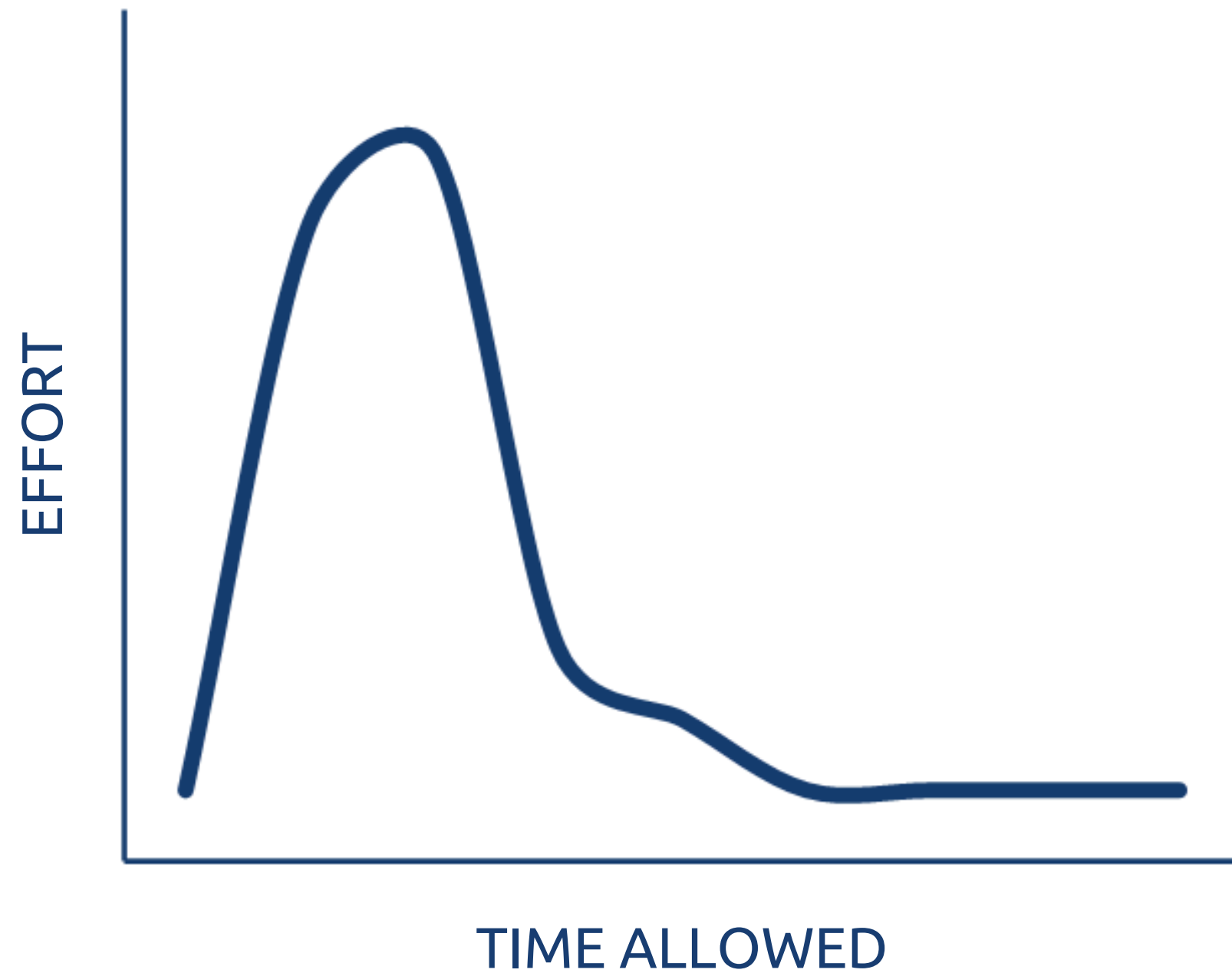
**DON'T  
CHANGE  
HABITS  
LEVERAGE  
THEM**





# BEHAVIOUR

## PARKINSON'S LAW



## PARKINSON'S LAW FOR PROCRASTINATORS





# IT'S ALL ABOUT PORTION SIZE

## BUFFET



## SMALL PLATES





# ALLOCATE: THE ORDER IS EVERYTHING

INCOME

1

PROFIT 5%



2

OWNERS PAY 50%



3

TAX 15%



4

EXPENSES 30%





# REMOVE TEMPTATION





# ROLLING OUT YOUR PROFIT FIRST



	STAGE 1	STAGE 2	STAGE 3	GOAL
REAL REVENUE	100%	100%	100%	100%
PROFIT				5%
OWNERS PAY				50%
TAX				15%
EXPENSES				30%



# QUARTERLY PROFIT ALLOCATION

## FUN MONEY



## RAINY DAY MONEY





# CHALLENGES







**PROFIT FIRST AS A SERVICE**

**HOW DOES IT WORK FOR  
BOOKKEEPERS?**



# EXISTING CLIENTS





# NEW CLIENT SUPPORT





# BUSINESSES ARE LOOKING FOR YOU!

**57% of leads**  
need help with  
**Bookkeeping &**  
**Profit First**





# PROFIT FIRST TRAINING









# IMPLEMENT IN YOUR OWN BUSINESS



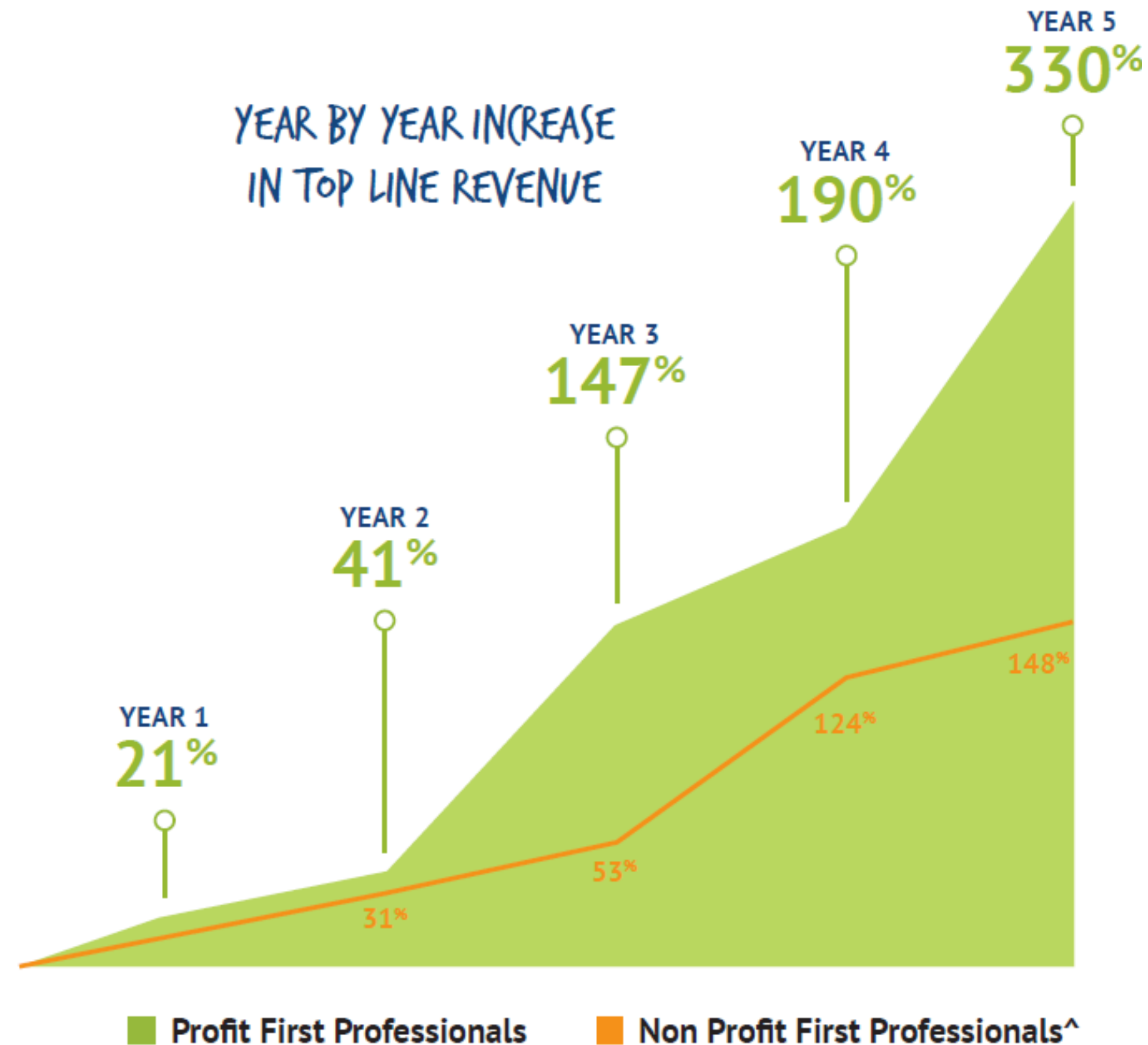


# IMPLEMENT WITH 2 BETA CLIENTS





# REVENUE INCREASE





A close-up photograph of a person's torso. They are wearing a dark, textured suit jacket. They are pulling open a white, long-sleeved button-down shirt with both hands, which are visible at the edges of the frame. Underneath the white shirt is a bright blue t-shirt. The text "are you ready?" is printed in a light blue, lowercase, sans-serif font across the center of the blue t-shirt. The lighting is dramatic, highlighting the textures of the fabrics and the person's hands.

are  
you  
ready?



# Meet the team

Our support crew...



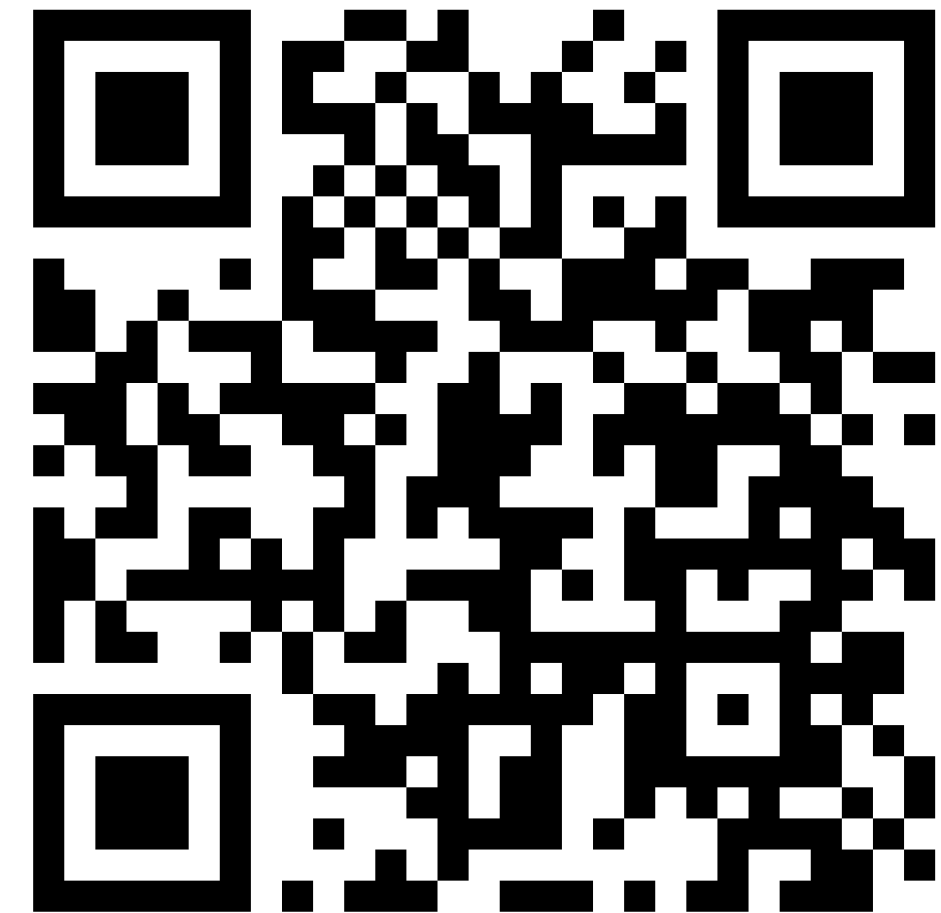


# NEXT STEPS

**Interested to know more**

**Book a Q&A call**

[profitfirstaustralia.com.au/questions](https://profitfirstaustralia.com.au/questions)







# **FAQ** **FROM BOOKKEEPERS**



