

Vivid Vision 2026



Troopers,

I told you that the pace of change was going to increase. Who could have seen what was going to happen in 2023? We committed to writing a book, and we made a movie! How cool is that? And we're just getting started!

When I look at what the business will look like in 2026, my mind is exploding with possibilities. I can tell you some of the ideas, but the reality is that no one really knows what the future holds for us as we strive to be the Go-to financial service provider for Creatives.

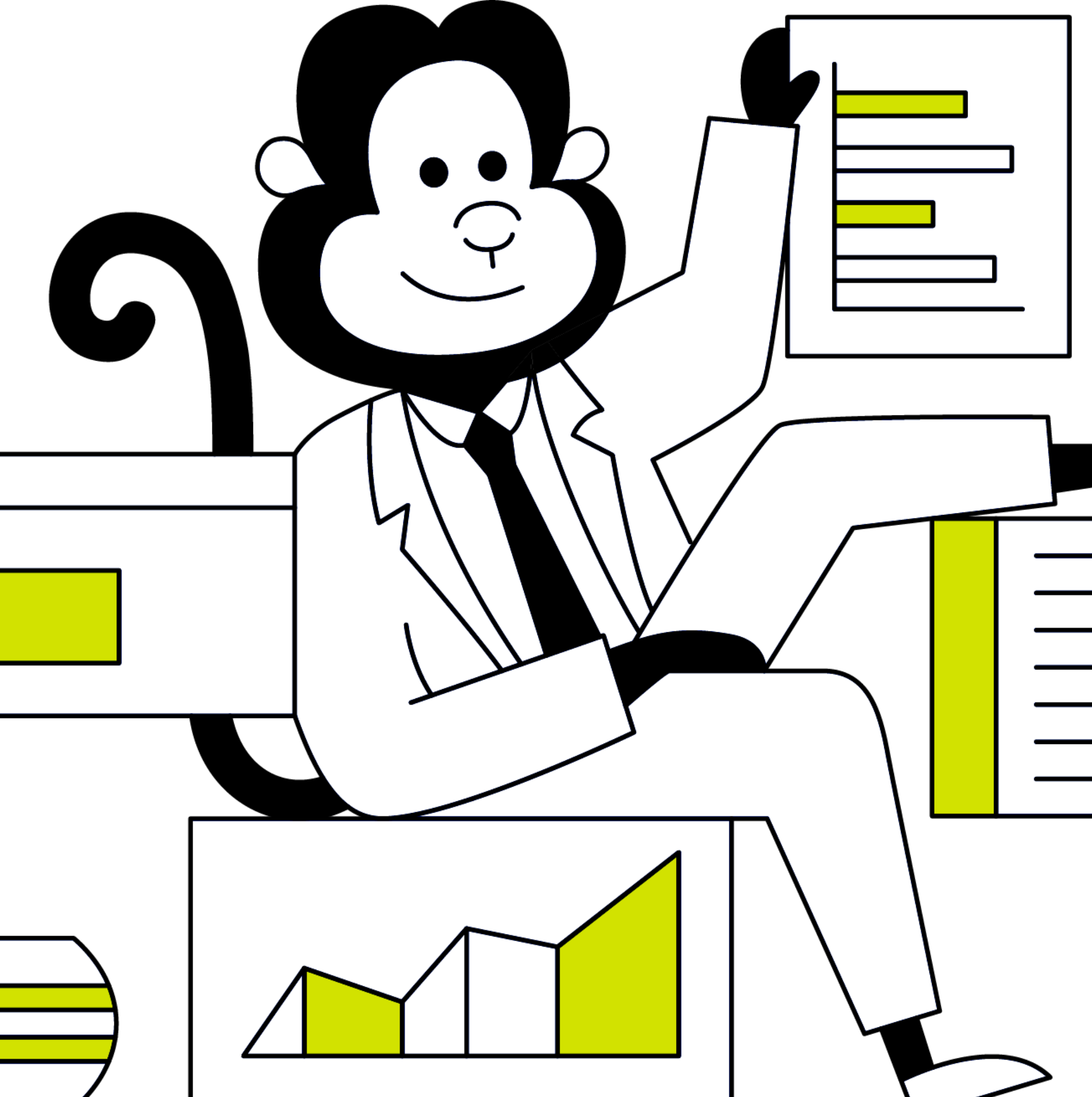
I envision that we will have developed a strategic partnership with someone who serves our industry to deliver a novel solution. Could this be partnering with a software vendor like Honeybook? Maybe. It could also be a partnership with an equipment finance company or a franchisor where they refer us their customers. Who knows?

I also think that in the next three years we will have developed industry customization for our services. Maybe it is completely visual financial reports or maybe white labeling software to assist with 1099's.

All of this will develop our reputation as an industry thought leader. Maybe we even host a live event here in Oklahoma City for Creatives!

Again, all of these things are just ideas. We all will participate in determining what it is we will be, so don't be scared by my ramblings. Just know that it is going to be awesome!





Listen



Adapt



Do What It Takes



Friendly & Fulfilled

WHO WE ARE

WHY WE EXIST

Enhance the Lives of our Clients and
our Team

WHAT WE DO

Providing Financial Information,
Clarity, and Peace of Mind

HOW WE DO IT

Grow Profitably

OUR CORE TARGET

Core is the go-to financial service
provider for Creatives

MARCIE BURNHAM-AUTOMOTIVE
SOLUTIONS

My husband and I have worked with Core group for years now. Jeremy has been our point of contact the last 5+ years and has always far exceeded our expectations. Tax season isn't my favorite, but I can rest assured knowing that Jeremy & Core Group always has my best interest at hand. Definitely wouldn't use anyone else. They are well worth the money especially considering their knowledge and expertise. Thanks for all you guys do! Our businesses appreciate you.

REED PERRY-DARN GOOD CREATIVE

Grateful that I found Core and that I get to work with you. I enjoy the friendship we've created and always look forward to our conversations.

CHRIS BRYANT-EMPIRE STUDIOS

I was singing Core's praises at Cine Gear Expo this weekend-hope it sends more business your way. You deserve it! Don't know what I'd do without you-you and your team save us SO much time.

KYLE THOMAS-THE PRODUCTION BAR

If you are self employed and in the video production space, then this is the group that you want to work with to save you the headaches of accounting, taxes and bookkeeping. Signing up with Core was the best decision I have ever made for my business. In the first tax season I saved almost \$10,000 in taxes based on their advise and have spent only a few hours on money related tasks that I would spend days trying to navigated on my own. They are a great business investing time and money into understanding the production world and an amazing group of extremely kind people always ready to do everything they can to help. The money invested in their services is more than worth the return!

TAI NEHISI-GET ORGANIZELY

Grateful that I found Core and that I get to work with you. I enjoy the friendship we've created and always look forward to our conversations.

RANDY KEMP-RK STUDIOS

Core has been a lifesaver for us over the past 16 years or so. Saved our bacon during tax season, especially our very first year together.

WHY WE EXIST

Never forget WHY we do what we do!

#adapt

At the core of our values is the ability to change for the benefit of our clients and our team.



Increased Gross Margin

In order to achieve our growth goals, we have increased our gross margin to the industry average of 50%.

By leveraging technology we're doing more without adding a proportionate number of people.

Improved Client Experience

We have continued to enhance the client experience by leveraging technology.

We expanded our Artificial Intelligence to better predict client's cash flow and financial future.

We simplified the information in a visual format that the client can use.

Target Market Focus

We are THE resource for creative entrepreneurs; Hosting thought leader events bringing together valuable resources to help them grow their businesses profitably.

Clients come to us organically because of the value we give.

Leadership Team

Our Leadership Team sit exclusively in their LT box and don't have any additional roles or responsibilities.

This allows them to focus exclusively on reaching our Core Target

#listen

In order to have impactful client relationships, and enhance Trooper lives, we must cultivate the most important skill of listening.



Quarterly Conversations

The most valuable thing we can do for clients is provide proactive financial conversations.

We offer quarterly conversations to every monthly clients following the TPOINT format

Strategic Partnerships

By diving deep into our Target market we have developed strategic partnerships with other service providers in our industry. This provides value for both Core and the client and makes our marketing more productive and efficient

Guides

By leaning into our Target Market we have become industry experts. We have developed resources outside of Core.

We can make specific recommendations for things like software and other professionals (e.g. legal).

#dowhatittakes

Delivering for our clients and our Troop
without excuses



Referrals

We continued our success with referrals in 2022. Revenue has adopted Referrals as one of its marketing strategies and continues to support Client Services in obtaining referrals equal to 10% of our client base per year

Reduced Cost of Acquisition

In order to have scalable growth, we lowered our cost of acquiring new clients. Referrals and Strategic Partnerships are ways we do this.

We have outsourced our Chief Marketing Officer functions to the Duct Tape Marketing team and it has worked wonderfully

Expanded Services

In 2023 we added CoreTax and CFP Lite service offerings to allow us to offer something for everyone in our target market.

We have fine tuned these offerings and price points and are well on our way to having 10% market share

#friendlyand fulfilled

Living fulfilled lives inside and outside of Core

Profit First for Creatives

We published Profit First for Creatives in 2024 and have sold 10,000 books. We have been asked to speak on various podcasts and at industry events.

We have partnered with Relayfi as an affiliate to use their software to help our clients implement Profit First in their businesses.

Additionally, we have created a separate service offering to help Creatives go deeper with Profit First to achieve their financial goals.

Improved Teamwork

Teamwork is a strategy for our business, not just a concept.

This will require ongoing efforts to improve Trust, Conflict, Commitment, Accountability, and Results.

We have 4 events a year focused on Teamwork

Trooper Onboarding

As we have grown and added new Troopers, we improved the onboarding experience to guaranty their success.

Wellness

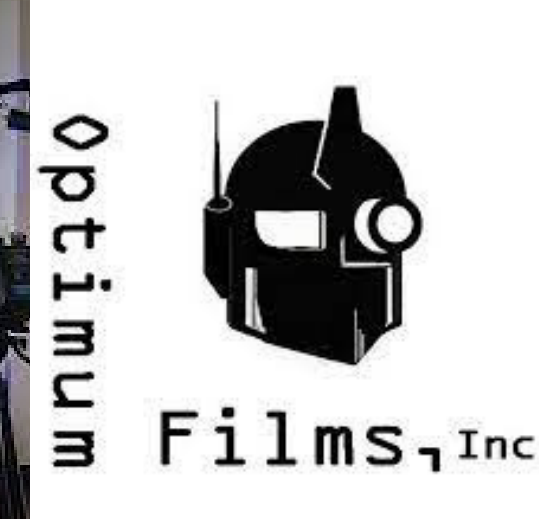
Our Troopers are healthy in all aspects of their lives, and Core is part of that. We provide a tremendous work environment and culture, and we support wellness in other aspects of our Trooper's lives.

Right Clients

Culture applies to clients as well as the team. We want to work with clients that NEED our service and VALUE what we do.

We have developed a screening process for culture fit for new clients.





COMPETE UNFAIRLY.

