

## Professional Office Business Overview



Offers professional services by true professionals. This office park is comprised of small business owners ready to serve the public.



### CEO

1. Submits loan application to bank.
2. Signs all business payroll checks.
3. Oversees business operations and makes business decisions.
4. Opens Utility Account.
5. Signs Insurance Policy and Lease Agreement.
6. Completes the Business Improvement Plan.
7. Prepares and gives speech at the Opening Town Meeting, if time permits.

### CFO

1. Places supply order.
2. Submits online request for business loan.
3. Inputs employee payroll information.
4. Processes business payroll.
5. Prepares direct deposit enrollment paperwork.
6. Completes Loan Promissory Note.
7. Makes business expense payments.
8. Makes business loan payments and tracks loan payoff progress.



### ADMINISTRATIVE ASSISTANT

1. Greets clients and directs them to correct team member.
2. Distributes business supplies.
3. Processes incoming mail.
4. Sets up Point of Sale system.
5. Works with CEO to determine product prices.
6. Prepares sales area with product display.
7. Assists customers with sales and processes payments for sale of products.
8. Takes precautions to avoid inventory loss.
9. Works with CFO to reorder additional inventory, if needed.

### CPA

1. Prepares and sends Accounting invoices.
2. Discusses Inventory Loss Prevention with retail shops.
3. Audits business financial records.
4. Educates CFOs on loan payoff tracking.
5. Visits the Supply Center to verify inventory accuracy.



### FINANCIAL ADVISOR

1. Researches financial investment process.
2. Markets to citizens the opportunity to invest money in a stock portfolio.
3. Greets customers and assists them in opening a stock portfolio.
4. Prepares and gives speech at the Closing Town Meeting, if time permits.

### INSURANCE AGENT

1. Completes Insurance Agent Licensing Exam.
2. Prepares and sends Insurance invoices.
3. Issues Insurance Policies to each *JA BizTown* business to cover property damage and liability.
4. Processes business insurance claim form and payment.

