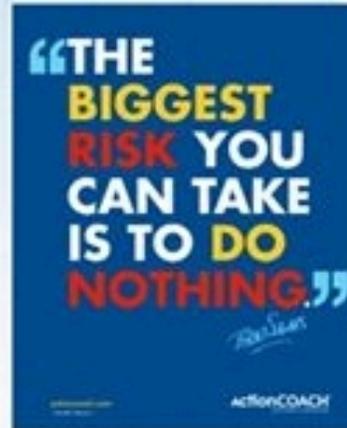


**FREE WEBINAR**

# 8 BUSINESS STRATEGIES TO SURVIVE THIS CRISIS!



Led and facilitated by ActionCOACH Dan Zimanski,  
a Local Business, Leadership and Executive Coach

**THURSDAY  
MARCH 26TH  
4:00 PM**

**REAL PEOPLE.  
REAL RESULTS.**

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BUSINESS COACHING

# YOUR BUSINESS RESOURCE TEAM

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Marketing

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# DISCLAIMER

The information you are being presented in this webinar is purely advisory. You bear sole responsibility for the use and implementations of these recommendations in your business. You agree to forever indemnify and hold harmless all panelists and presenters from and against any loss, cost, or expense resulting from your activities related to the subject matter in this webinar.

# TEAM COMMUNICATIONS

## Daily huddle and business dashboard

### Action Steps:

1. Define routine time for a 10 – 15 min daily huddle
2. Develop agenda
3. Health, safety, care & compassion
4. 3 -5 priorities to win the day – laser focus and clarity
5. Define company dashboard – 8-10 KPI's
6. Are we winning or losing? What needs to change?
7. Celebrate EVERY win!
8. Pivot Strategy - brainstorm

## Secure your Remote Workforce

### Action Steps:

1. Enable 2FA/MFA for all employees
2. Ensure connections into your business are encrypted
3. Deploy Acceptable Use Policy and Remote Work Policy
4. Provide security protection for your staff's personal devices
5. Reinforce or start Security Awareness Training exercises
6. Review your password policy and remind employees
7. Create a communication and collaboration channel around security

# MARKETING

## Don't let up on advertising

### Action Steps:

1. Focus on bonding
2. "We're here for you"
3. Origin stories
4. Customer Stories
5. Look for advertising opportunities

## Develop Post-Covid-19 H.R. Plan

### Action Steps:

1. Stay updated on new legislation.
2. Review current H.R. policy – is it consistent with government recommendations and workplace laws?
3. Review current emergency response plan and include “Infectious Disease Preparedness and Response”
4. Prepare for compliance with “stay at home” order.
5. Identify critical job roles and functions to ensure continuity.
6. Designate responsible person to manage covid-19 issues.
7. If needed, seek legal counsel.

# ACCOUNTING

## Define your new break even

### Action Steps:

1. Review and revise 2020 budget/projections
2. Recalculate COGS
3. Identify and eliminate overhead bloat
4. Get your financials current NOW!
5. Federal & State tax planning/updates

# BANKING

## Know Your Numbers

### Action Steps:

1. Possibilities for Financial Assistance...bank/SBA/grants
2. Loan information...terms/rates/maturities
3. Current Balance Sheet and Income Statement
4. List of opportunities lost
5. Updated Personal Financial Statement
6. Last 2 years Personal/Business Tax returns ready

# FINANCIAL PLANNING

## Growth of \$100,000 (Total Return)

TI+ I Shares (TIPWX) has delivered capital appreciation through increases in the value of the underlying real estate. Since inception through the most recent quarter (4.1.2014 - 12.31.2019), TIPWX delivered an attractive total return through the payment of consistent distributions and capital appreciation of its underlying real estate.



All tabular and chart return data reflect total return, which reinvests, if applicable, all income and capital gains distributions during the period, divided by the starting price. *Past performance does not guarantee future results.*

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# FINANCIAL PLANNING

## FOUR CONSECUTIVE YEARS HIGHEST RISK-ADJUSTED RETURN OF ALL REAL ESTATE SECTOR FUNDS (2016 - 2019)<sup>1</sup>

\*open-end, funds, closed-end funds, and exchange-traded funds have significant differences in liquidity.

An **open-end fund** is a type of mutual fund that does not have restrictions on the amount of shares the fund can issue. The majority of mutual funds are open-end, providing investors with a useful and convenient investing vehicle. Shares are bought and sold on demand at their net asset value (NAV), which is based on the value of the fund's underlying securities and is calculated at the end of the trading day.

A **closed-end fund** is organized as a publicly traded investment company by the Securities and Exchange Commission (SEC). Like a mutual fund, a closed-end fund is a pooled investment fund with a manager overseeing the portfolio; it raises a fixed amount of capital through an initial public offering (IPO). The fund is then structured, listed and traded like a stock on a stock exchange. Unlike open-end funds, closed-end funds trade just like stocks. While open-end funds are priced only once at the end of the day, closed-end funds are traded and priced throughout the day. Closed-end funds also require a brokerage account to buy and sell, while an open-end fund can often be purchased directly through a fund provider.

An ETF, or **exchange-traded fund**, is a marketable security that tracks a stock index, a commodity, bonds, or a basket of assets. Although similar in many ways, ETFs differ from mutual funds because shares trade like common stock on an exchange. The price of an ETF's shares will change throughout the day as they are bought and sold. The largest ETFs typically have higher average daily volume and lower fees than mutual fund shares which makes them an attractive alternative for individual investors.

<sup>1</sup>**Source:** Morningstar Direct, annualized Sharpe Ratio, based on daily data from 2016, 2017, 2018 and 2019. Using Morningstar data compiled by BlueRock Fund Advisor, LLC, TIPRX received the highest Sharpe Ratio among 1,189 open, closed end, and exchange traded funds in the global real estate sector equity category for the one year periods ending 12.31.19, 12.31.18, 12.31.17, 12.31.16



### Annualized Return (Thru 12.31.2019)

	One Year	Three Year	Five Year	Since Inception <sup>1</sup>
TI+ Class A	7.37%	7.08%	7.10%	7.92%
TI+ Class A with Max Sales Charge <sup>2</sup>	1.20%	4.99%	5.85%	7.04%

<sup>1</sup> Inception date of the A Shares is October 22, 2012. <sup>2</sup> The maximum sales charge for the A shares is 5.75%. Investors may be eligible for a waiver or reduction in sales charge.

The performance data quoted here represents past performance. Current performance may be lower or higher than the performance data quoted above. Investment return and principal value will fluctuate, so that shares, when redeemed, may be worth more or less than their original cost. Past performance is no guarantee of future results. A Fund's performance, especially for very short periods of time, should not be the sole factor in making your investment decisions. For performance data current to the most recent month end, please call toll free 844-819-8287. Returns are Annualized, TIPRXA Shares; no load. The total annual fund operating expense ratio, gross of any fee waivers or expense reimbursements, is 2.43% for Class A. The Fund's investment adviser has contractually agreed to reduce its fees and/or absorb expenses of the Fund, at least until January 31, 2020 to ensure that the net annual fund operating expenses will not exceed 1.95% for Class A subject to possible recoupment from the Fund in future years. Sharpe Ratio and standard deviation are only two forms of performance measure. **The Sharpe Ratio would have been lower if the calculation reflected the load.**

Additional fund performance details available at [bluerockfunds.com/performance](http://bluerockfunds.com/performance).

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# INSURANCE

## Review & update Insurance Policies

### Action Steps:

1. Make sure all crisis business changes are covered by your current policy(s)
2. Worker's Comp Policy - what you need to know...
3. Employee Handbook – document processes and procedures now so it will cover future pandemic events
4. Stay in communication with your agent

# CONTACT US



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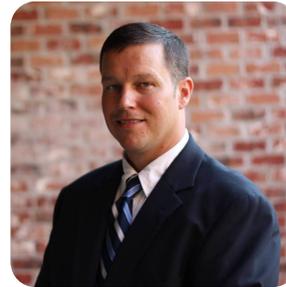
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