



State of the Business - Executive Summary  
For the Month End of April 2024

INCOME	\$ 14,014.67
EXPENSES (not including owner draw)	\$ 4,087.12
PROFIT/LOSS	\$ 9,927.55

BUSINESS STATUS - CLIENT GROWTH

Total Health & Marketplace Clients	134
Total Medicare Clients	39
Life Clients	8
Annuity Clients	170
Other Clients (Dental/Vision/Cancer/Legal/Etc)	58
TOTAL CLIENTS	409
Total Clients Last Month	419
Clients Gained/Loss	-10

BUSINESS STATISTICS - REVENUE GROWTH

Last Year MTD Revenue	\$ 8,665.73	
Last Year Consulting Revenue		\$ 6,869.20
Total Commission Revenue		\$1,796.53
Current MTD Total Revenue	\$ 14,014.67	
Consulting Revenue		\$ 6,961.62
Total YTD Commission Revenue		\$ 6,950.74
Last Year Compared to MTD Total Commission Revenue		\$ 5,154.21
Percent +/- Over Last Year		74%
Current YTD Revenue Projection		\$ 29,393.11
Current YTD Actual Revenue		\$ 32,021.94
		\$ 2,628.83
Current YTD Premium		\$ 314,904.14
Previous YTD Premium		\$ 187,450.66
Premium +/- Over Last Year		\$ 127,453.48
Percent +/- Over Last Year		68%

SPECIAL NOTES

Did client cleanup audit on ACA Leads resulting in terminated policies.  
Continue to work on Agency contracting.

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I have reviewed the month end packaged including the income statements, receipts and expenses and find them to be in good accurate order. I have also reconciled the banking accounts and made adjustments as needed including made charitable and taxable earnings payments.

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Davan M. Johnson, CIA  
Founder & President