

Financial Services for Individuals, Businesses & Financial Firms

From tax prep to full-service finance teams — we serve individuals, SMEs, CPAs, accounting firms, and finance departments with scalable solutions.

BOOK A MEETING



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www.jdctaxandfinance.com

Who We Are

JDC Tax & Finance is a trusted leader in custom business planning. Whether you're launching a new venture or growing an existing one, we help turn your ideas into funding-ready realities.

Your success is our mission. We don't just write business plans — we build roadmaps to results.

15,000+

business plans delivered

92%

customer satisfaction

400+

trusted across 400+ industries

Why Clients Choose JDC Tax & Finance:

- ✓ Top-tier Expertise: U.S.-based team of MBAs and analysts
- ✓ Investor-Ready Plans: Built to meet SBA, bank, and visa standards
- ✓ Fast Turnaround: Delivered in as little as 7 business days
- ✓ Global Support: Serving clients across the U.S. and internationally

"Thank you, guys. Very much appreciated. Looks like I got that investor. Woo-Hoo! They loaned me the money for my personal pay for a year, AND invested. I can't thank JDC Tax & Finance enough."

— Konstantino, business owner

The Problem

"The JDC Tax & Finance team is incredible. Their work is beyond expectation. I am very impressed by their thorough research and quality. Even though my industry is very new and emerging, the team caught the essence of it perfectly."

— Soo Young Choi, business owner

Starting and growing a business isn't easy.

Many entrepreneurs struggle with:

Poorly structured plans that fail to secure funding



Lack of time or planning expertise



Misguided market research and unreliable financial forecasts

Our Solution

We deliver professionally written, fully customized business plans tailored to your business goals and industry.

01.

Market
Research &
Analysis

02.

5-Year
Financial
Forecasting

03.

SBA- &
Investor-
Compliant
Plans

04.

Immigration
Visa Plans (E-2,
L-1, EB-5)

05.

Competitor
Benchmarking

06.

Reliable
Market
Research and
Financials

"Haven't spoken to you in a while and thought I would update you on our progress. We did receive approval for our SBA loan (no doubt due to your strong business plan) and are now moving into the closing stages. Thank you again for all your help!"

— Giles Lippard, business owner

What's Included in Your Business Plan

"Absolutely stellar! The financials were spot-on and the design wowed our investors."

— Food & Bev Entrepreneur, NYC



25–35+ page custom-written business plan



Detailed market and competitive analysis



5-year financial model (P&L, Cash Flow, ROI, Use of Funds)



Executive summary, exit strategy, and growth forecasts



Professional-grade design with charts and visuals



Direct access to an MBA business writer & project manager

Our Services

We offer more than just plans — we provide a path to business success.



Award-Winning Business Plans



Add-Ons: Pitch decks, websites, branding, marketing content



1-on-1 Consultations with seasoned MBAs & financial analysts

"I've created a very specific and successful firm plan in a matter of weeks, and the help I received has been outstanding. In terms of money and investing opportunities, they also provided me more assistance. I sincerely appreciate the additional support, and if you're looking for a dependable and knowledgeable business plan writing service, I wholeheartedly endorse JDC Tax & Finance."

— Stefan Alberto, business owner

Our Process

Simple. Structured. Strategic.



"I am very excited to have had the opportunity to work with JDC Tax & Finance. They made the process very easy and the final product is amazing. I feel confident and ready to market my plan and appreciate all of the team that worked on it."

— Kimberly Pettigrew,
business owner

01. Onboarding – Select your plan, schedule a consultation
02. Discovery – Intake call, industry-specific research begins
03. Development – Your dedicated team writes & forecasts your plan
04. Review & QA – Edits for compliance, clarity, and accuracy
05. Delivery – Final plan in PDF + editable format
06. Ongoing Support – Post-delivery revisions, marketing help & more

Proven Results

"The JDC Tax & Finance team helped us secure \$2M in equity funding. The plan was professional, thorough, and exactly what investors wanted."

— Tech Startup Founder, Colorado

15,000+

business plans completed

92%

client satisfaction

30%+

of clients return or refer others

400+

industries served



We've helped clients secure:

- SBA funding
- Franchise approvals
- Investor capital
- Approved leases
- Business visas

Why JDC Tax & Finance?

"Amazing work! Worked with me every step of the way while finalizing my feasibility study and business plan."

— Jimma Elliott-Stevens - Attorney

Confidence your plan is done right.



Deep industry knowledge



100% U.S.-based MBA writers



10-year average writer experience



Fast, investor-grade turnaround



Personalized support — start to finish

Business Plan Samples

Financial Objectives

The following table and graphs illustrate the financial goals of Galaxy One Properties during the next five years. The financials are explained in detail throughout the duration of the plan.

Financial Highlights (\$1,000's)																			
	M1	M2	M3	M4	M5	M6	M7	M8	M9	M10	M11	M12	Y1	Y2	Y3	Y4	Y5		
Revenue	0	0	0	0	0	0	0	0	0	0	77	1	2	78	157	252	334	387	478
Gross Margin	0	0	0	0	0	0	0	0	0	0	25	1	1	26	52	94	186	140	170
Operating Expenses	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	51	66	68	74
EBITDA	-4	-4	-4	-4	-4	-4	-4	-4	-4	-4	21	-3	-2	22	9	46	54	72	96
Net Profit	-6	-6	-6	-6	-5	-5	-5	-5	19	-5	-4	20	-13	26	36	60	60	87	
Gross Margin/Revenue	0%	0%	0%	0%	0%	0%	0%	0%	32%	90%	90%	33%	33%	37%	37%	36%	36%		
EBITDA/Revenue	0%	0%	0%	0%	0%	0%	0%	0%	27%	-52%	-15%	26%	6%	18%	17%	19%	20%		
Net Profit/Revenue	0%	0%	0%	0%	0%	0%	0%	0%	25%	-82%	-270%	26%	-8%	10%	12%	16%	18%		
Net Cash Flow	59	-8	-8	-8	-8	-8	-8	-8	69	-59	-6	70	80	-39	10	30	55		
Cash Balance - Ending	59	51	44	36	29	21	14	6	75	16	10	80	80	41	51	81	135		



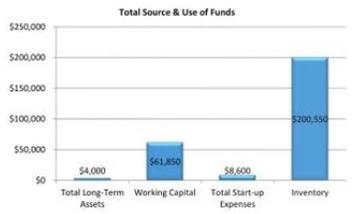
Start-Up Summary

The following tables and graphs detail the funding the business will need to bring the vision to reality. Start-up funding includes all the expenditures, both start-up assets and start-up expenses, incurred before the Company starts earning revenue. The working capital element of the asset table represents the balance of cash at the beginning of Month 1 of the financial projections.

Use of Start-up Funding	
Expenses	
Legal Fees	\$1,500
Grand Opening Advertising	\$4,000
Website Development	\$3,000
Initial Office Supplies	\$100
Total Start-up Expenses	\$8,600
Long-term Assets	
Furniture & Equipment	\$2,000
Computer & Accessories	\$2,000
Total Long-term Assets	\$4,000
Short-term Assets	
Working Capital	\$61,850
Inventory	\$200,550
Total Short-term Assets	\$262,400
Total Expenses & Assets	
Total Start-up Expenses	\$8,600
Total Start-up Assets	\$266,400
Total Funding Requirements	\$275,000

Total Start-up Funding	
Total Amount Being Requested	\$250,000
Total Funds Already Received	\$25,000
Total Funding	\$275,000
New Start-up Funding Being Requested	
Bank Amount Being Requested	\$250,000
Total Amount Being Requested	\$250,000
Start-up Funding Already Received	
Owner Contribution	\$25,000
Total Funding Already Received	\$25,000
Start-up Capital and Liabilities	
Loss at Start-up (Start-up Expenses)	(\$8,600)
Total Funds Received & Requested	\$275,000
Cash Balance on Starting Date	\$262,400

As shown in the charts above and the graph below, the total start-up funding needed to implement this venture successfully is \$250K. The owner has invested \$25K in personal funds to create the Company's brand to date. As depicted above, \$8.6K will be used for start-up expenses; \$4K will be used to purchase long-term assets. The remaining balance of \$61.8K will be used for working capital.



Total Funds Allocated

Projected Income Statement

Galaxy One Properties intends to deploy its funding to maximize growth and profitability. In the Income Statement table below, gross margin equals sales minus direct costs. The "bottom line" or profit (as measured before and after interest, taxes, depreciation, and amortization) equals gross margin minus operating expenses.

Pro Forma Income Statement					
	Year 1	Year 2	Year 3	Year 4	Year 5
Revenue	\$156,900	\$252,174	\$314,345	\$382,012	\$477,667
Subtotal Cost of Revenue	\$104,604	\$158,556	\$198,038	\$246,902	\$307,982
Total Cost of Revenue	\$104,604	\$158,556	\$198,038	\$246,902	\$307,982
Gross Margin	\$52,296	\$93,618	\$116,308	\$140,110	\$169,685
Gross Margin/Revenue	33.33%	37.12%	37.00%	36.20%	35.52%
Expenses					
Rent	\$1,308	\$1,341	\$1,374	\$1,409	\$1,444
General Insurance/Liability	\$1,200	\$1,230	\$1,261	\$1,292	\$1,325
Business License/Permits	\$1,020	\$1,046	\$1,072	\$1,098	\$1,126
Telephone/Internet	\$3,000	\$3,075	\$3,152	\$3,231	\$3,311
Website Hosting/Updates	\$612	\$627	\$643	\$659	\$676
Marketing & Advertising	\$15,600	\$15,990	\$16,390	\$16,799	\$17,219
Supplies	\$600	\$615	\$630	\$646	\$662
	\$1,680	\$1,722	\$1,764	\$1,806	\$1,848
	\$3,231	\$3,311	\$3,391	\$3,471	\$3,551
	\$1,938	\$1,987	\$2,036	\$2,085	\$2,134
	\$907	\$925	\$943	\$961	\$979
	\$400	\$400	\$400	\$400	\$400
	\$3,509	\$3,976	\$4,443	\$4,910	\$5,377
	\$3,471	\$35,656	\$36,641	\$37,626	\$38,611
	\$71,842	\$95,943	\$120,044	\$144,145	\$168,246
	\$72,242	\$96,343	\$120,444	\$144,545	\$168,646
	\$11,494	\$8,568	\$5,642	\$2,716	\$0
	\$60,348	\$87,375	\$114,402	\$141,429	\$168,456
	15.59%	18.29%	21.00%	23.71%	26.42%

Projected Cash Flow

The following depictions of Galaxy One Properties' projected cash flow show that the Company expects to maintain sufficient cash balances over the five years of this plan. The "pro forma cash flow" table differs from the "pro forma income statement" table. Pro forma cash flow is intended to represent the actual flow of cash in and out of Galaxy One Properties. In comparison, the revenue and expense projections on the income statement include "non-cash" items and exclude funding and investment illustrations.

Pro Forma Cash Flow					
	Year 1	Year 2	Year 3	Year 4	Year 5
Cash Received					
Revenue	\$156,900	\$252,174	\$314,345	\$382,012	\$477,667
Proceeds from Bank Loan	\$250,000	\$0	\$0	\$0	\$0
Owner Contribution	\$25,000	\$0	\$0	\$0	\$0
Subtotal Cash Received	\$431,900	\$252,174	\$314,345	\$382,012	\$477,667
Expenditures					
Expenditures on Operations					
Total Personnel	\$11,520	\$14,832	\$27,499	\$31,471	\$35,656
Bill Payments	\$99,004	\$246,312	\$244,691	\$290,767	\$349,187
Subtotal Spent on Operations	\$110,524	\$261,144	\$272,189	\$322,238	\$384,844
Additional Cash Spent					
Start-up Costs	\$8,600	\$0	\$0	\$0	\$0
Principal Loan Repayment	\$27,762	\$30,066	\$32,562	\$35,264	\$38,191
Purchase Inventory	\$200,550	\$0	\$0	\$0	\$0
Purchase Long-term Assets	\$4,000	\$0	\$0	\$0	\$0
Subtotal Cash Spent	\$351,436	\$291,211	\$304,751	\$357,502	\$423,035
Net Cash Flow	\$80,464	(\$39,037)	\$9,594	\$29,510	\$54,633
Cash Balance	\$80,464	\$41,428	\$51,022	\$80,532	\$135,165

Cash Flow Assumptions: (1) Proceeds from Bank Loan assume funds were received in the amount of \$250K; (2) Owner Contribution is \$25K.

Market Analysis Summary

Real Estate And Rental And Leasing

Key Statistics

- Revenue: \$1.1 tr
- Annual Growth 2015-2020: 2.3%
- Annual Growth 2020-2025: 0.7%
- Profit: \$497.4bn
- Annual Growth 2015-2020: 2.5%
- Annual Growth 2015-2025: 2.5%
- Profit Margin: 47.0%
- Annual Growth 2015-2020: 0.3%
- Annual Growth 2015-2025: 0.3%

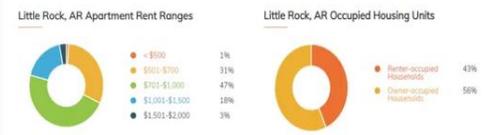
This sector is primarily concerned with operators involved in the management, sale, purchase, and rent of real estate. This sector also includes renting and leasing tangible goods, such as equipment, and intangible goods, such as patents. It is important to note that operators primarily engaged in renting or leasing equipment with operators are excluded from this sector and commercial mortgages, treated as a financial instrument.

Additionally, this subsector's performance has been aided by an increase in housing starts, which have increased an annualized 0.2% during the period. The version in the lessors of real estate industry group has also been supported by falling vacancy and stymied by a slight uptick in homeownership, likely a consequence of record-low interest rates.

Moreover, as residential and nonresidential construction activity increases, so does the demand for construction machinery and equipment, which has supported growth in the Rental and Leasing Services subsector via the commercial and industrial machinery

Key Market Stats¹:

- The average rent in Little Rock is \$840, according to RENTCafé (as of February 2021).
- Rental rates in Little Rock have increased by 4% year over year.
- Renter-occupied households in Little Rock make up 43% of the occupied housing units.
- 43% of the housing units in Little Rock rent for between \$701 and \$1,000 per month, while 36% have monthly rents of less than \$700.



35.33 or 43% of the households in Little Rock, AR are renter-occupied, while 46.636 or 56% are owner-occupied. These growth trends bode exceptionally well for Galaxy One Properties as it establishes its brand in the marketplace.

Market Size

The number of establishments in the industry is approximately 693,640, which is expected to increase at an average annual rate of 0.8% over the next four years to reach 620,604 in 2025. The distribution of Real Estate and Rental and Leasing sector establishments most closely follows the nation's population's distribution. Often, sector establishments will be concentrated in population-dense urban areas that are short on space. Additionally, sector establishments tend to focus on these areas due to high levels of construction activity, which increase demand for rental and leasing services for construction and heavy machinery. The Southeast is the most concentrated region of sector activity, accounting for an estimated 25.5% of sector establishments. The next-most entire region of sector activity in the West accounts for 20.4% of sector establishments. Following this, the Mid-Atlantic region accounts for 15.6% of sector establishments. Lastly, the Great Lakes region accounts for 10.8%, and the Southwest accounts for 12.0%. No other region accounts for more than 10.0% of sector establishments. These trends bode well for Galaxy One Properties, as they show the substantial profits available for successful industry players.²



years to 2020, and Rental and Leasing in the United States is expected to reach \$1.1 trillion in 2020 amid the COVID-19 pandemic.¹

Thank You!

What will be your success story?

Let JDC Tax & Finance help bring your vision to life.



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