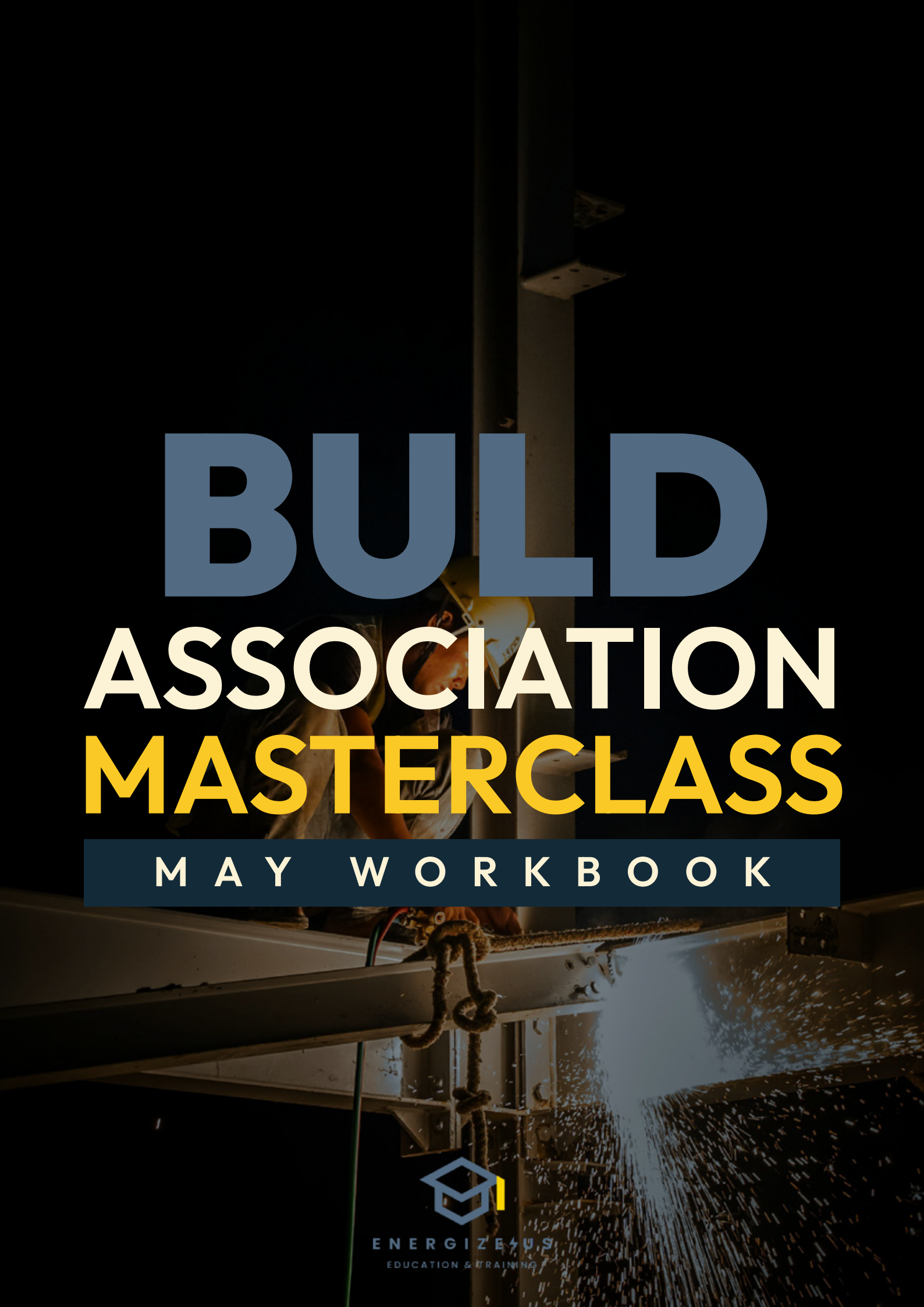




BUILD ASSOCIATION MASTERCLASS

M A Y W O R K B O O K



ENERGIZEUS
EDUCATION & TRAINING



ENERGIZE US EDU INC
BULD ASSOCIATION MASTERCLASS | MAY WORKBOOK

MAY MASTERCLASS THEME

Financial Management Basics: Budgeting, Pricing, and Profit Margins

SESSION FORMAT

(2-HOUR BLOCK)

15 min Book Review: Profit First by Mike Michalowicz

45 min Energize Lesson Plan: Pricing systems, profit targets, and tax planning

15 min Builder Discussion: What are you underpricing? Wheres your money going?

45 min Live Q&A: Price-building, startup cost frameworks, contractor tax prep

COURSE MISSION

This month we address the financial blind spots most contractors face: not charging enough, not knowing their numbers, and not planning ahead.

MODULE 1: STARTUP COSTS AND BURN RATES

One-time startup costs vs. recurring overhead
Determining monthly burn rate
Fixed vs variable costs

Assignment:

List your operating costs and calculate your monthly burn rate.



COURSE MISSION

This month we address the financial blind spots most contractors face: not charging enough, not knowing their numbers, and not planning ahead.

MODULE 2: PRICING AND PROFIT MARGINS

Gross vs. net margins
Markup vs. margin differences
Pricing by labor, tools, materials

Assignment:

Calculate margin on a common job and create a 5-service price sheet.



COURSE MISSION

This month we address the financial blind spots most contractors face: not charging enough, not knowing their numbers, and not planning ahead.

MODULE 3: MANAGING EXPENSES AND TAX PLANNING

- Contractor tax obligations (quarterlies, 1099s)
- Tax budgeting and reinvestment
- Personal vs business accounts
- Tools: QuickBooks, Jobber, Gusto

Assignment:

Build an expense tracker. List 3 ways to reduce/manage costs.



ENERGIZE FINANCE TOOLKIT:

Tools: QuickBooks, Gusto, Jobber, Bench

Assignment: Choose a tool and record 3 benefits.

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