**2023-2024 Financial UA Annual Trajectory**

***Financial***

**Income:**

Maintain income via sales of existing workbooks & 7th Tradition Donations.

Increase income by offering Second Edition of 12 Step Workbook

Increase income by publishing Traditions Workbook #2 (covering 7-12)

Increase Subscriber count by releasing new YouTube videos to help populate the sales

funnel for literature.

Drive traffic, donations and sales through releasing new YouTube content.

Q4 2023 offering of NYC Bootcamp.

Strong Q4 push for end of year tax deductible donations.

Rebuild and upsize membership base and support their Prosperity leading to Donations

**Expenses:**

Prudently spending program funds focusing on Value gained for every dollar spent.

Streamline & downsize expenses to stay within income and get non-profit discounts

Set aside funds to launch BA and UAA. End plans for GR, WFUA, PWA & WoAnon launch

**Debt Repayment:**

Repay current debt to ODI C&C of $300 and plan for future video costs

Repay M1 margin of $1050

Repay SBA EIDL of approx. $1724

Celebrating repayment of approx. $9000 of outstanding loans

**Wealth:**

Retain wealth in checking acct and future fund by budgeting on Cashflow

Coordinate with FUA Finance Committee, Financial Advisor & Accountant as funds allow

Maintain stability during 2023 Recession & Inflation and recover from 2022 stock crash.

***Expansion***

**FUA – MOVE FORWARD CAUTIOUSLY**

Add any necessary components to FUA Program and complement them with program

announcements & YouTube videos. Add new Meetings & Workshops as needed.

Support pop-up Workshops to increase member participation and competency

Develop and release Second Edition Step Workbook & Traditions Workbook #2

**WFUA – MAINTAIN a HOLD POSITION PENDING DECISION to GROW or PRUNE**

Set a Trajectory to either develop this up or start phasing it out.

End plan for launch of WFUA Fellowship. Instead keep a part of FUA for now, ( T.B.D. )

**Golden Ratio – SLOWLY MOVE FORWARD**

Work cooperatively supporting expansion of Golden Ratio Workshops

Train FUA members to qualify as a G.R. Sponsor

Launch new YouTube video series premiering new G.R. Workbook topics

End plan for launch of G.R. Fellowship. Instead keep a part of FUA.

**Boundaries Anonymous – SLOWLY MOVE FORWARD**

Build infrastructure necessary to launch this fellowship

Coordinate with ODI C&C to build Website, develop YouTube content

Register with State and Federal agencies as needed.

Write 12 Step / Tradition Workbook

Begin training future Qualified Sponsors

**Underachievers Anonymous – PLACE ON HOLD UNTIL FURTHER NOTICE**

Build infrastructure necessary to launch this fellowship

Coordinate with ODI C&C to build Website, develop content

Register with State and Federal agencies as needed.

Write 12 Step / Tradition Workbook

Begin training future Qualified Sponsors

**Powerful Women Anonymous (Business Owners) – END and REALLOCATE RESOURCES**

**Women Anonymous (Woman Anonymous) – END and REALLOCATE RESOURCES**

**YOUTUBE – Financial UA (437subs) – GROW AGGRESSIVELY WITH AVAILABILE RESOURCES**

Target 1000 subscribers by EOY 2024

Coordinate with ODI C&C for Media & Content Production, SEO, Marketing

Complete videos on all FUA Tools (Recovery, Prosperity, Techniques)

Complete video series on FUA 12 Steps, 12 Traditions, Golden Ratio Workbooks.

Produce videos on topical subjects as needed

*Goal is 11 new videos in 2023*

1) FUA en Español (featuring Genaro)

2) FUA in Austrian (featuring Zuzana)

3) Envelopes & Notecards (Prosperity Tool)

4) Sponsorship (Recovery Tool)

5) To the Business Owner

6) Earning Power – catch the Rainbow

7) 12 Step Millionaire

8) Step Five (12 Step Workbook)

9) Money, Energy, Happiness Inventory—MEH! (Prosperity Tool)

10) Fire Purification (Spiritual Technique)

11) Interviews (Prosperity Tool)

**Power Flow FUA Newsletter (365 subs) – GROW SLOWLY AND ORGANICALLY**

Target 1000 subscribers by EOY 2023

805 Contacts – 363 Subscribers

Utilize YouTube integration embedding new videos

Continue to integrate new Literature links for one-click purchasing

**Website – GROW SLOWLY AND ORGANICALLY**

Update site as needed – grammar & punctuation.

Build a committee or closed workshop series to review the website in real time

and make corrections or updates.

Add new YouTube content and one-click links for videos and literature purchases.

**Board of Directors – GROW AGGRESSIVELY YET ORGANICALLY**

Meeting two (2) times during 2023

Hold space for possible end of term for ONE Director

Select, Train & Mentor TWO new Directors.

Support Board & Committee synergy

Save / Raise funds, Research and Obtain Board of Director Insurance for all Directors

**Service Office – GROW SLOWLY & ORGANICALLY**

Generate income, building passive income / wealth to fund office rent, insurance, utilities, phoneline, outreach services, developing literature, maintain website &

Domains, offering PRG’s, ZOOM account, etc…

Host Qualified Sponsor Retreat 2023

Host Recovery Bootcamp in NYC in 2023

**Literature – GROW SLOWLY, STEADILY & ORGANICALLY**

Complete and publish: “FUA Traditions Workbook #2”

Refresh and publish Second Edition (updated) of FUA 12 Step Workbook

Develop “Spiritual Jobs – BJ to AJ”

Develop Zero to Fifty

Develop Fifty to One Hundred

**Meetings – HOLD AND MAINTAIN STABILITY. ALLOW ORGANIC GROWTH**

Launch Traditions Workshop #2 focusing on FUA Traditions Workbook #2

Support rotation & onboard new Trusted Servants to stabilize & serve existing Meetings

**Legal Issues – PROGRESS SLOWLY, CAUTIOUSLY & ORGANICALLY**

Continue to compile list of legal issues needing clarification.

Is **The Richest Man in Babylon** – within the Public Domain ?? -- Not Yet / uncertain.

Can FUA register as a Religion / Church – Yes, requires re-registration & funding

Can FUA purchase a property tax exempt – Yes, once established as a R/C with Lawyer

Research and retain legal counsel specializing in non-profit organizations / churches

--yes when funding is available.

**Addendums (from 2021 Annual Corporate Meeting) for Further Exploration – WITH FOLLOW UP ACTIVITY COMPLETED**

Developing a Cashflow Statement

-- see Four Quarters Annual Report for Cashflow Statement

Developing a chart showing ratios of growth to debt

--once a Financial Advisor is retained or Jay gets a degree in Finance

Developing a statement showing “Days of Cash on Hand”

--see Petty Cash line item and FUA Checking account line item on Annual Report

Developing a statement showing Debt Service Coverage Ratio

--see Four Quarters Annual Report Debt Load line items

Developing a Debt to Asset Ratio

--see Four Quarters Annual Report for Net Worth Statement

Creating an Investment Policy to provide guidance for future Directors / Trustees

--Under development once we add to Directors / Trustees and have more assets

under management

Develop numerical targets for growth in addition to action steps for growth

--See Annual Trajectory for category by category plan for growth and related

numerical targets

**VISION for 2023 - 2024 as submitted by FUA Members**

**Annual Trajectories often have a S/W/O/T analysis:**

Here we offer Offense vs. Defense

***OFFENSE -- COMPLETIONS & ACCOMPLISHMENTS:***

* **DEVELOP “SPONSORSHIP GUIDELINES” WEBPAGE**
* **DEVELOP “TO THE BUSINESS OWNER” WEBPAGE**
* **COMPLETED NOVEMBER 2022 RECOVERY BOOTCAMP IN NYC**
* **RELEASE OF YOUTUBE VIDEOS:**

**“EARNING POWER”, “THREE DOLLAR JOB”, “TREASURE MAP”**

* **HOSTED ONE FUA FIFTH STEP AT THE SERVICE OFFICE / RETREAT CENTER**
* **GAINED ONE NEW QUALIFIED SPONSOR**
* **OPERATING WITHIN THE CASHFLOW OF LITERURE SALES & 7TH TRADITION DONATIONS, EVEN AS MEMBERSHIP & DONATIONS SHRANK.**
* **FUA YOUTUBE CHANNEL GREW AND NOW REACHES 437 SUBSCRIBERS**
* **SUPPORTED FUA VISION BOARD WORKSHOP EVENT**
* **FOCUS ON TRADITION ONE – UNITY WITHIN THE FELLOWSHIP (FEMALE & MALE)**

***DEFENSE -- SURVIVAL:***

* **SURVIVE INFLOW AND OUTFLOW OF UA MEMBERS AND EFFECT OF STABILITY BOREDOM AND NOT FOLLOWING THROUGH. SURVIVE THE DISEASE & SYMPTOMS OF ANOTHER FELLOWSHIP VIRALLY INFECTING FUA.**
* **MAINTAINING FELLOWSHIP SOLVENCY DURING MASSIVE ECONOMIC AND MARKET DOWNTURN WHILE ALSO SIGNIFICANTLY PAYING DOWN DEBT.**
* **SURVIVE THE DISQUALIFICATION OF A SPONSOR AND ADDRESS PROCESS-SKIPPING, STABILITY BOREDOM AND NOT FOLLOWING THROUGH (HAVING THE HARD CONVERSATIONS) AND THE IMPACT ON THE PROGRAM AND MEMBERS**
* **SURVIVE THE CLOSING OF WFUA AND “MEN-ONLY” GOLDEN RATIO WITH EMPHASIS ON MEMBER UNITY AND GENDER INTEGRATION.**
* **SURVIVE THE LOSS OF ONE DIRECTOR / TRUSTEE STEPPING DOWN**