

www.theexceptionalplan.com

Creative

Innovative

Accountable

Results-Driven

Trustworthy

Exceptional



the
exceptional
plan

Changing What It Means to
Be a Business Owner,
Exceptionally.

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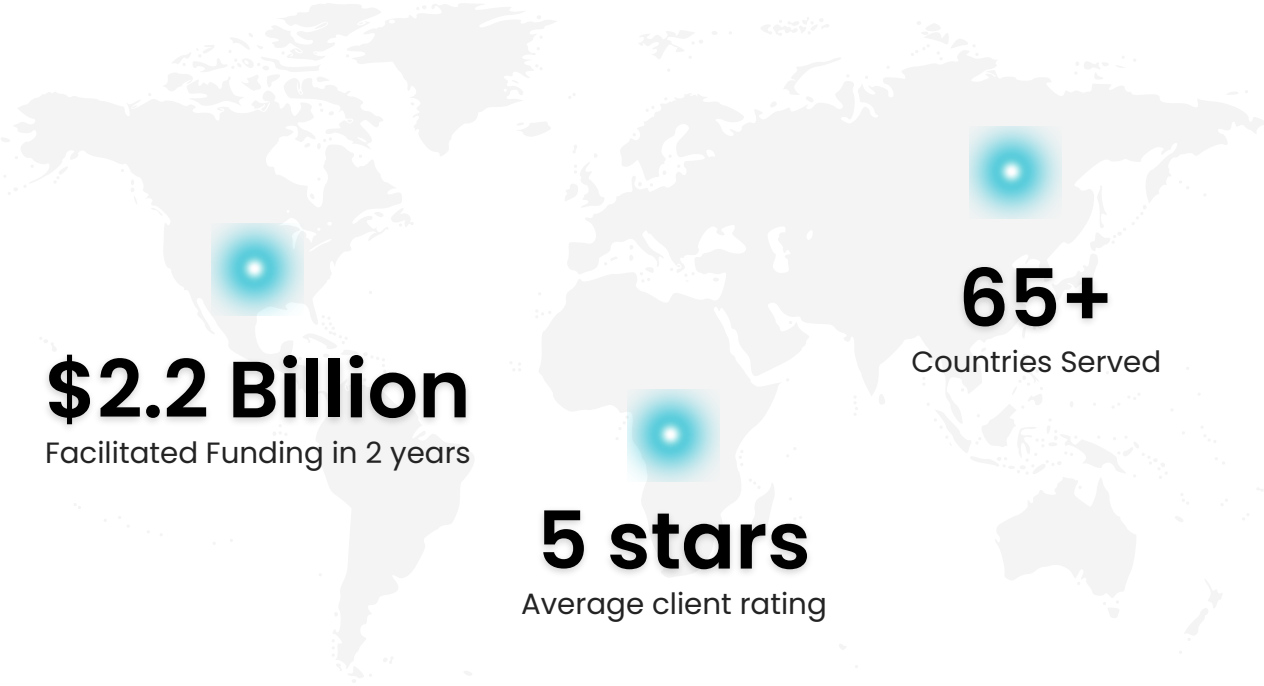
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OUR STORY

The Exceptional Plan was founded with one belief: every entrepreneur deserves the opportunity to build the life they dream of.

We are **partners**, **strategists**, and **believers** in human potential.

01



\$2.2 Billion

Facilitated Funding in 2 years

65+

Countries Served

5 stars

Average client rating

About Us.

The idea for The Exceptional Plan officially started on the back of a napkin. But really, it began years earlier, when our founder and CEO asked her mom what was playing on the screen. Her mom explained it was an advertisement, a commercial, and part of business. That moment sparked something special. Smiling, she told her mom, "I'm going to do that one day."

By the age of eight, she had already started her own company and scaled it. That early spark never faded. Today, The Exceptional Plan exists to give everyone who feels that spark, the drive to create, to lead, and to change their world, the opportunity and support to turn their dreams into reality.

Vision for the Future

At The Exceptional Plan, our mission is to redefine what it means to build a business and create a world where more entrepreneurs succeed.

We empower founders with expert guidance, innovative tools, and hands-on support at every stage.



We are determined to lower the business failure rate globally by 10%

through expert guidance, innovative tools, and hands-on support at every stage.

A Word From Our Founder.



To our founders and business owners,

Thank you for trusting us with your work, your ideas, and the vision you are bringing to life. Business is one of the most personal things we ever take on as humans. It holds our courage, our persistence, and the quiet belief that what we are building can change our lives and the lives of others. Being invited into that process is something we do not take lightly.

This world is but a canvas to our imagination. -Henry David Thoreau

When I built my own company, it was driven by conviction and an unwillingness to let an idea go unfinished. That energy does not disappear once you become an entrepreneur. It becomes part of who you are.

It shapes how you move through the world and how you choose to show up, even when the path feels uncertain. To be trusted by others who carry that same drive is incredibly meaningful to me.

We believe in you. We believe in what you are building and in the imagination it takes to see possibility where others may not.

This is the beginning of where we are going together, and I can't wait for the journey ahead.

Cheers ~

Kaylee Philbrick-Theuerkauf

CEO/Founder, The Exceptional Plan

HOW TO WORK WITH US

At The Exceptional Plan, we work with businesses at every stage of their journey and within the communities that help them thrive.



02

What We Do.

At The Exceptional Plan, we help founders and business owners build exceptional companies. Through strategy, financial clarity, and leadership support, we stay with you from early planning through growth and exit.



Business Plans



Pitch decks and
pitch preparation



Custom financial
models and forecasts



Accounting and
bookkeeping



Fractional CFO
support



Marketing planning
and strategy



Fractional CMO
leadership and execution

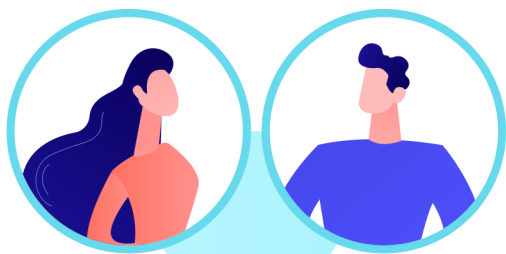


Strategic advisory
and decision support



Growth Planning and
Exit preparation

Not sure where to start? Take a look at our roadmap on the next page to see which stage best fits where you are today.



Exceptional Start

For founders launching or pivoting

- Early or pre-revenue businesses
- Preparing for lenders, investors, or visa requirements

What we offer:

- Business plans
- Financial models and projections
- Lender and investor pitch decks

Exceptional Scale

For founders ready to grow with structure

- Generating revenue but stretched thin
- Needing clearer strategy, marketing leadership, and financial oversight

What we offer:

- Strategic advisory and growth planning
- Marketing planning and fractional CMO leadership
- Fractional CFO support, accounting, and bookkeeping



The background features several large, light purple gears of different sizes. A winding blue path with green circular accents leads through the scene. Along this path, various stylized human figures are depicted: a man with a lightbulb idea, a man with a briefcase, a man with a laptop, a woman with a laptop, a man with a briefcase, a woman pointing at a large chart, a woman in a business suit, and a man with a briefcase. There are also icons of a hand, a bar chart, a triangle, and a city skyline.

Exceptional Exit

For founders preparing for what comes next

- Considering a sale, succession, or step back
- Wanting a stronger, buyer-ready business

What we offer:

- Exit focused financial models and KPI planning
- Clean, professional financials and reporting
- Exit planning and advisory support

Why Work With Us?

When you work with us, you are not hiring a vendor. You are working with a team that cares about your business, your goals, and where you are trying to go.



True Partnership

We work alongside you, not above you or behind the scenes. We stay involved, ask the hard questions, and help you make clear decisions at every stage.



Experienced Guidance

You work directly with seasoned advisors who understand funding, growth, and exits. Our guidance is practical, honest, and grounded in real experience.



Clear and Reliable



Built to Be Used

Everything we create is meant to be shared, reviewed, and challenged. Our plans, models, and decks are built to stand up in real conversations.



Exceptional Care

We believe exceptional businesses are built with intention. That means thoughtful strategy, clean financials, and work that reflects the effort you are putting in.

Want to see real work?

Scan to view sample plans, pitch decks, and client examples.



WHAT OUR CLIENTS SAY

Our clients describe us best because their success is the measure of ours.

Here's what entrepreneurs, business owners, and visionaries have experienced working with The Exceptional Plan.

03

The Exceptional Difference.

Our impact goes beyond deliverables. You'll see it in stronger businesses, lasting partnerships, and the real-world results our clients and partners experience with The Exceptional Plan.



I'd give more stars if I could. The Exceptional Plan took my idea and turned it into the best business plan my banker had ever seen. They guided me with care, cheered me on, and treated me like a friend. The best investment I've made in my business.

Kimberlee T., Business Owner



The Exceptional Plan doesn't treat clients like transactions. They make you feel like part of the team, with care, pride, and true collaboration in every detail.

Alex H., CEO/Founder



Available day or night, The Exceptional Plan team delivers business plans and financials that consistently earn praise from reviewers including investors. Their quick turnaround and attention to detail make them a trusted ongoing partner.

Lane L., CEO/Founder



It takes a village to start a business.
Let The Exceptional Plan be yours.

Ready to build something **exceptional**
together?

Schedule Time



or Call Us Directly!

316-218-9898