



*Building and Protecting Your Tomorrow... Today*

We provide business and financial strategies to business owners who want to take the action needed to achieve their financial objectives, not just for the business, but more importantly for the people involved (Ownership, Key Employees, Staff).

Our focus is on the very most important asset in your company -- the people (**Human Capital**).

The **Universal Truth** in Business:  
Every owner will "exit" their business.  
The **Question** is, on whose terms?  
... *Circumstance's, Others,... or Yours!*

## Our Client Experience- **Your Results**

Our clients are positively positioned to grow their businesses and to live each day the way they want to live it.

Now they have strong relationships with us, and together they manage their business now the way they envisioned so long ago— achieving their financial goals today, while they enjoy building their legacy for tomorrow.

A legacy built for themselves, their families, their employees, and their community.

They manage their business today the way they envisioned from the beginning.



## TRANSITION **PLANNING**

Transition planning is working together, with you the business owner, to plan for the transitions from your business through the remaining productive phases of your professional life... while setting the stage for your retirement and family inheritance.

### **OUTCOMES FROM TRANSITION PLANNING**

#### **TAX REDUCTION**

Maximize Net Profit

Preserve family wealth - Keep more, pay less

#### **RISK MANAGEMENT**

Assess, Control, Reduce Core Risk

Protect you most valuable asset for you and your family

#### **INVEST IN YOUR PEOPLE**

Companies Are Defined By Their People

Key Person Package, Financial Wellness Program for Staff

#### **IMPROVE AND MAXIMIZE BUSINESS VALUE**

Increase Business Value

9 Value Drivers grow the intrinsic and the market value of your company

#### **STAY IN CONTROL**

Plan and Execute Transition and "Exit" On Your Terms

Keep control throughout the transition period until you reach all of your objectives.

### **Contact**

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# Our Purpose - Empower You

We emphasize that **people grow business value**; properly aligned, they assure successful transitions for business owners.

Our **proprietary Transition Planning Process** is people-focused, not spreadsheet obsessed. We combine formal exit planning, as nationally certified Exit Planners (CEXP), with practical business advising, and professional financial strategies...

... so that the you and your family can live a meaningful life as you define it.



## Leverage Our Experience - You Maximize Your Business Value

### Take One Action, One Step...

... Contact Us **Today**

....request a discussion with us.

### Get An Executive Assessment

- Several hour conversation with a LHP Senior Advisor. Use of our Software and proprietary process.
- A full **Transition Plan Executive Review** to analyze your company and your personal situation.

The best counsel we can give a business owner is to begin planning for their transition **today**. Some perspective... Private Equity firms know their 'exit' strategy from day one.

Outcomes of Transition Planning:

- Increase cash flow
- Strengthen the management team
- Coordinate the cost effective use of all advisors
- Get key employees and staff oriented and focused on achieving your ownership goals?



### Contact Us **Today**:

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We keep you in **Control** of your business, as we minimize your **Risk**, while maximizing business net **Value**.

- **Transition Planning:** Prepare the business owner, from a position of control, for the single, most important financial event of your life – the transition out of their businesses, on your terms – converting an illiquid asset into liquid, retirement assets and cash for yourself, your families, and future generations.
- **Tax Reduction:** Maximize the net profit and cash for the business owner and your family through time-tested strategies and techniques.
- **Risk Management:** Identify and manage core risks that can threaten to destroy your years of work to build this most valuable asset of for you the owner and your family.
- **Invest In Your People:** Successful companies are powered by confident people who are achieving their financial objectives and personal aspirations. We design and implement innovative compensation strategies that are deeply valued by everyone in the company.
- **Improve Business Value Drivers:** Focus on 9 specific, key factors to grow the intrinsic and market values of the business.



Exit  
Planning  
Workbook  
for Business Owners

Take Control Of Your Business Exit, Your Financial Future... Your Legacy

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LEGACY HP



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